Chapter 5 *Express for Windows User's Guide*

Utilities

Utilities

This chapter covers some of the more specialized options of Express for Windows. You may find a need for the following options as you become more familiar with the software: importing and exporting files, purging requests and reports, and viewing the communication logs and system information.

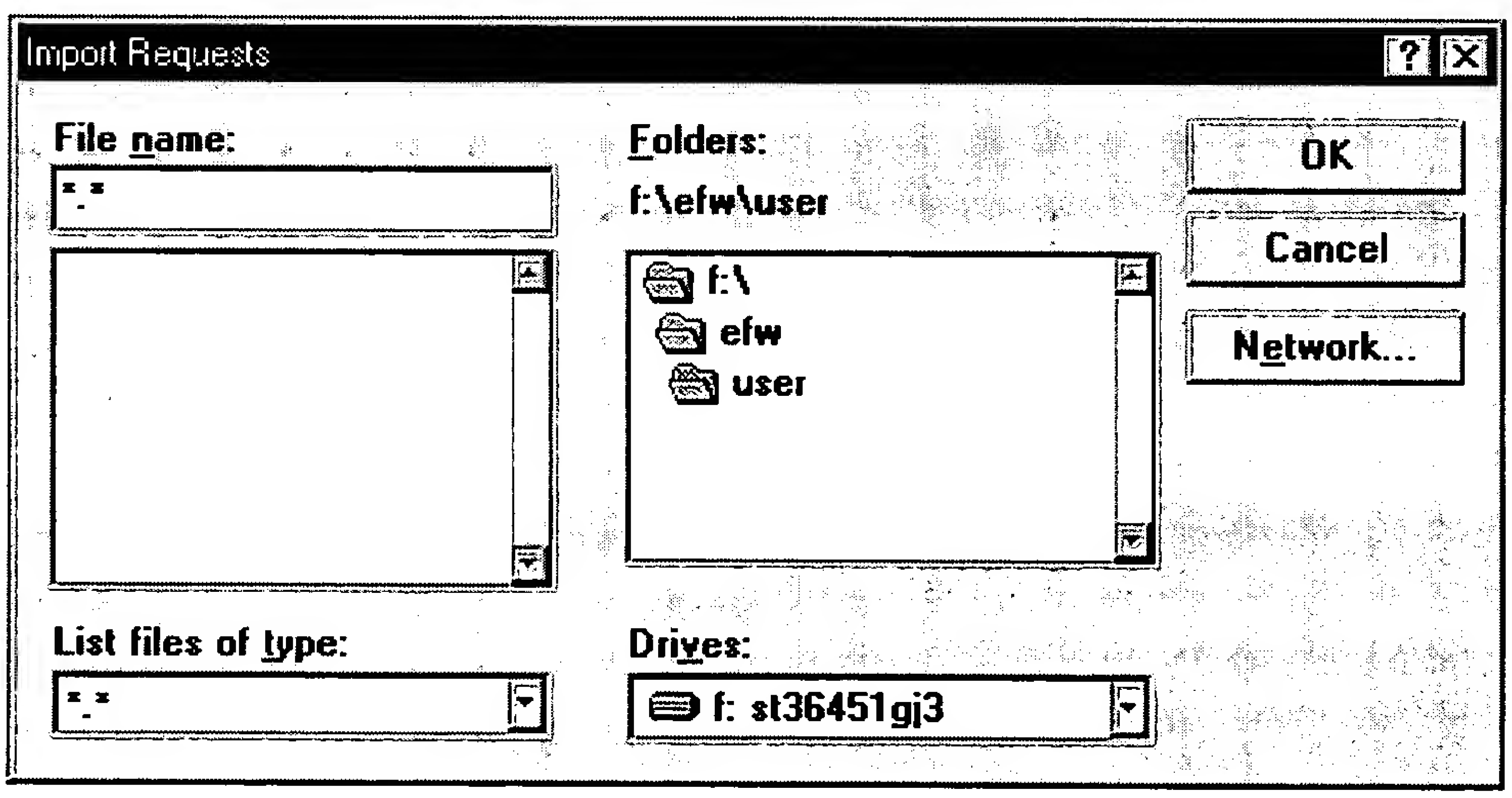
Importing Request Data

This option reads a pre-formatted data file and translates the information into requests which may then be processed with the normal transmission procedure. The data file, however, must match one of the required layouts; two formats are provided.

To import request data into Express

1. Prepare the data file requests in the required format (see "Record File Layouts" in the Appendices).

2. Select Import from the File menu. The Import Requests dialog box displays.



3. Using standard Windows file selection procedures, select the drive, directory, and filename where the requests are located.

4. Click **"OK"** to begin the import process. When the import process completes, the View/Edit Requests window displays with the requests in a group named *Import #xx*. If errors occur, a message is displayed and you are directed to *iporterr.log,* a log of the import errors encountered.

> **Note:** Any request which does not meet the system edits will be marked with a red file marker to the left of the driver name. Select each bad request from the list box then click **"Edit"** to display the request information. Click **"OK"** in the request information dialog box and a message will display pinpointing the invalid information. You may then correct it and accept that request.

Sort the list by Status to group all "bad" requests

5. Click **"OK"** to save the request group. The group description defaults to a group named "Import #xx" but this description may be changed. Follow the instructions for Saving Requests.

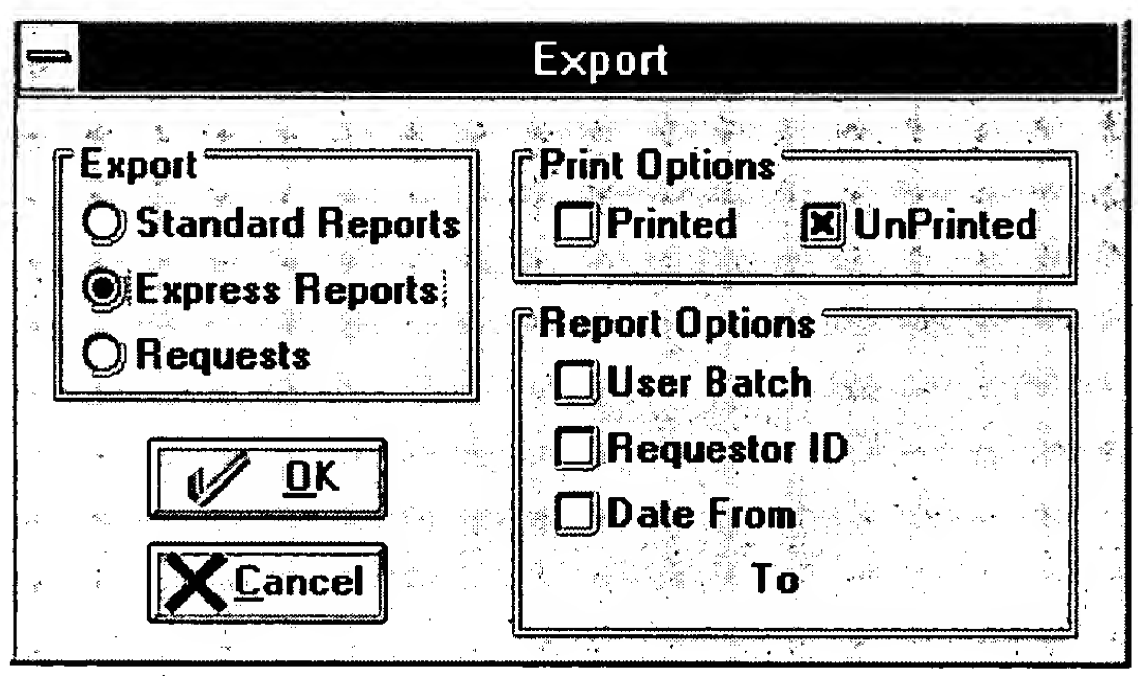
Exporting Files

The Express export options read either request or report files, format the data, and copy it to another drive and/or directory which you specify to use with other systems or applications----or just to store the information offline. The following sections detail exporting Express request information and Express reports.

Exporting Reports

To export reports from Express

1. Select **Export** from the File menu. The Export dialog box displays.



2. Choose one of the report export options. You may choose to export reports in either the Express or Standard format; however, the preferred method is the newer Express format.

3. For Print Options, select to export Printed or Unprinted reports, or both.

4. For Report Options, select User Batch, Requestor ID, and/or Dates then enter the required information. *All reports are exported if you do not choose a report option.*

5. Click **"OK"**. The Export dialog box displays.

6. Using standard Windows selection procedures, select the drive, directory, and enter a filename where the reports are to be copied.

7. Click **"OK"** to begin the export process.

Note: If an error occurs in the process, note the error message and see "Error Messages" in the Appendices for help.

When the export process is complete, the system displays the number and location of reports exported.

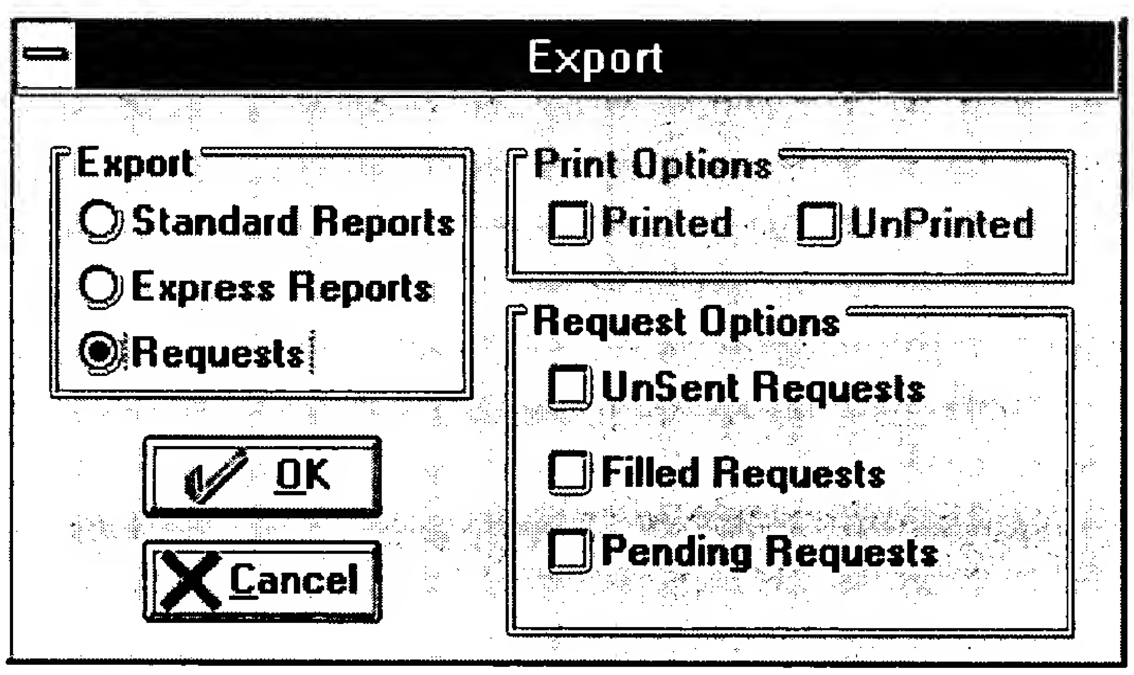
8. Click **"OK"** at the completion message box.

9. Click **"Cancel"** to exit the option.

Exporting Requests

To export requests from Express

1. Select **Export** from the File menu. The Export dialog box displays.



2. Select the **Requests** option button. The Request Options display. *All requests are exported in the Express format.*

3. For Request Options, choose to export UnSent, Filled, or Pending Requests, or all three.

4. Click **"OK"**. The Export dialog box displays.

5. Using standard Windows selection procedures, select the drive, directory, and filename

where the requests are to be copied.

6. Click **"OK"** to begin the export process. When the export process is complete, the system displays the number and location of requests exported.

7. Click **"OK"** at the completion message box.

8. Click **"Cancel"** to exit the option.

Purging Requests and Reports

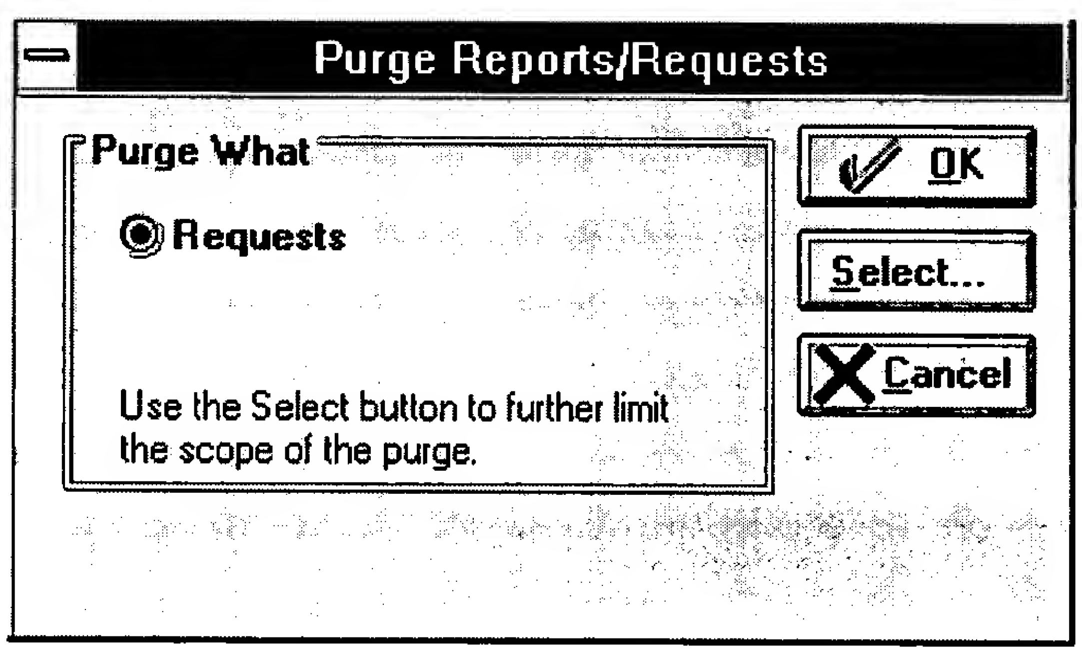
Express requests and reports are never automatically deleted. They remain on your system for an indefinite time and you must remove them using the Purge option. When you do, you must be the only user on the system.

Purging Requests

To purge requests from your system

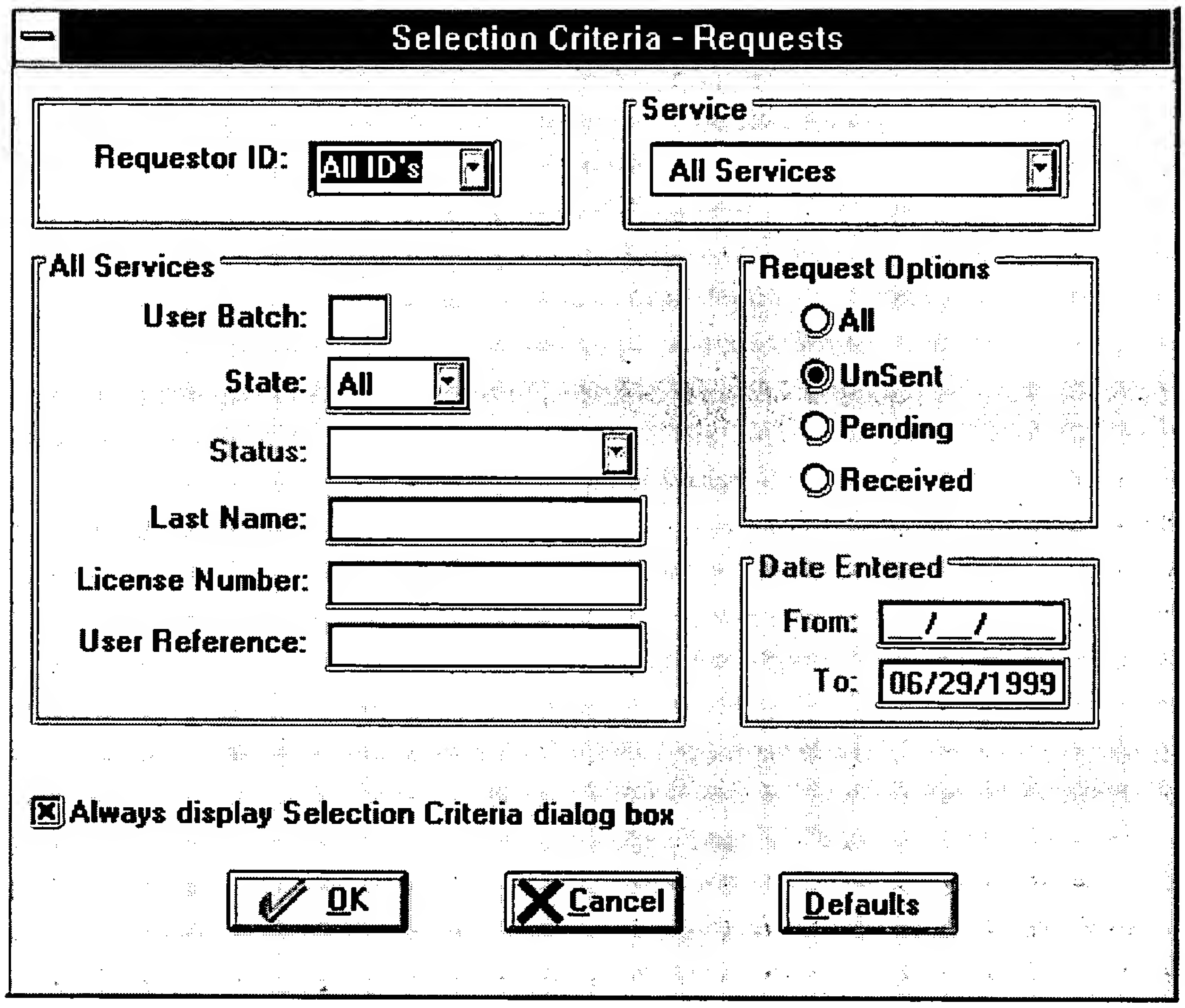
1. Select **Purge Database...**Click on **Requests** from the File menu. Depending on user preference, one of two dialog boxes will display.

- The *Purge Reports/Requests* dialog box for requests



or

- The *Requests Selection Criteria* dialog box



If the *Purge Reports/Requests* dialog box displays, click **"Select"** then skip to the section, "Choosing Selection Criteria for Requests" before continuing with Step 2.

If the *Selection Criteria* dialog box for Requests displays, read the following section, "Choosing Selection Criteria for Requests," before continuing with Step 2.

Choosing Selection Criteria for Requests

The Request Selection Criteria dialog box allows you to set preferences for which requests you want to remove before starting the purge function.

The Express default is to purge all unsent requests; however, you (or your office) may decide to change this based on selection criteria which may include, according to selected service, the following:

- Requestor ID, User Batch, State, Last Name, License Number, User Reference, and All Requests (or only Unsent, Pending, or Received).

If you choose to change selections based on selection criteria, those preferences remain in effect for all Express request functions and services until you change them or reset them to the default.

Because any user on the system may change selection criteria without another user knowing, a check box at the bottom of the Selection Criteria dialog box allows you to always (or never)

display the criteria dialog box. This allows you to verify which requests are selected prior to carrying out a print or purge function.

Note: If you choose not to always display the Selection Criteria dialog box, be aware that all available requests may not be selected even though they do exist.

2. Click **"Defaults"** to select all unsent requests or change the criteria as described below.

   Requestor ID

   Select a Requestor ID or select All IDs.

   Service

   Select an Express service or All Services.

   User Batch

   Enter a User Batch number. If you do not, all batches are purged.

   State

   Enter a specific state or select All. To refine the purge, enter a Last Name, License Number, and/or a User Reference. The License Number and User Reference options are available only for MVR request purges.

   Request Options

   Choose Unsent, Pending, or Received (or All) requests.

Note: The Defaults button resets the selection to include all unsent requests.

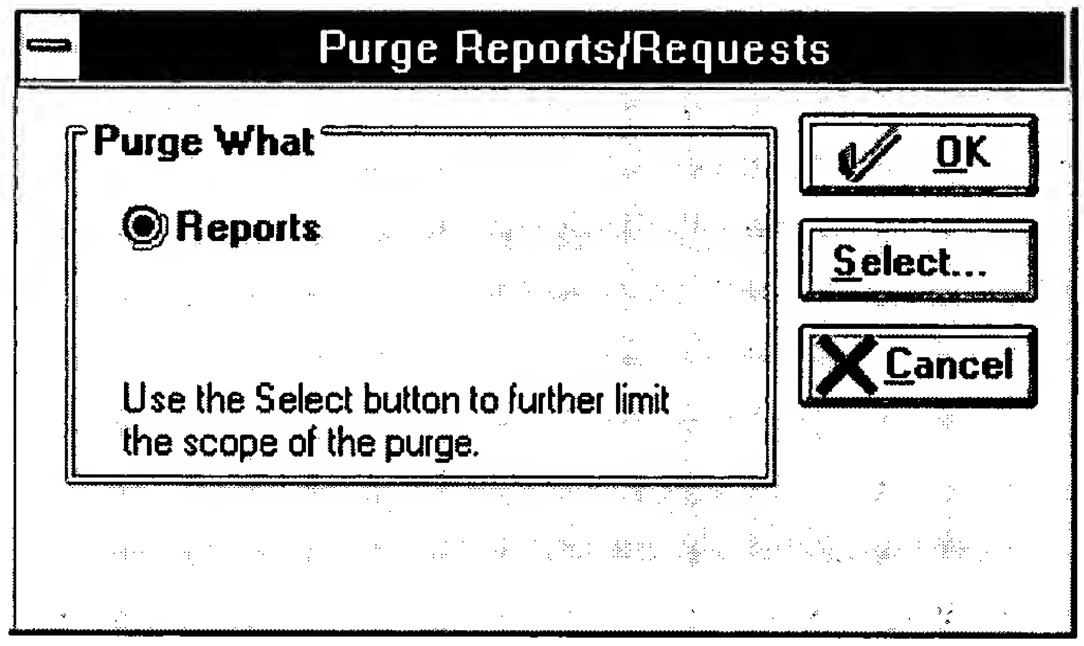
3. Click **"OK"**. The Purge Reports/Requests dialog box displays.
4. Click **"OK"**. The system displays the number of requests to be purged.
5. Click **"OK"** at the confirmation prompt to permanently remove from your system all requests matching the selected criteria.
6. Click **"OK"** at the completion message box.

Purging Reports

To purge reports from your system

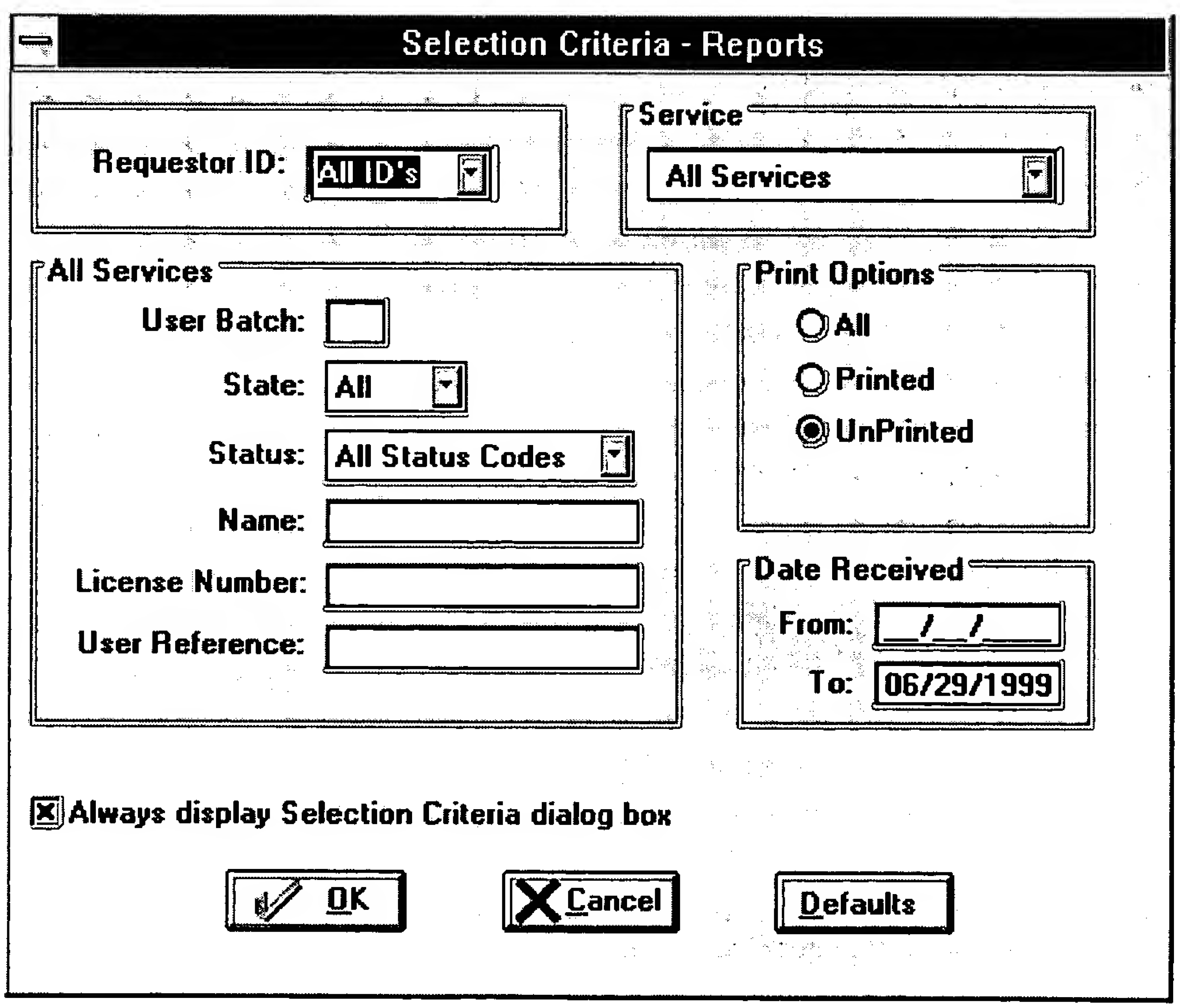
1. Select **Purge Database.** Then click on **Reports** from the File menu. Depending on user preference, one of two dialog boxes will display.

- The *Purge Reports/Requests* dialog box for reports



or

- The Report Selection Criteria dialog box



If the *Purge Reports/Requests* dialog box displays, click **"Select"** then skip to the section, "Choosing Selection Criteria for Reports" before continuing with Step 2.

If the *Selection Criteria* dialog box for Reports displays, read "Choosing Selection Criteria for Reports," before continuing with Step 2.

Choosing Selection Criteria for Reports

The Report Selection Criteria dialog box allows you to set preferences for which reports you want to purge prior to carrying out the purge function.

The Express default is to purge all unprinted reports; however, you (or your office) may decide to change this based on selection criteria which may include, according to selected service, the following:

- Requestor ID, Service, User Batch, State, Status, Name, License Number, User Reference, and All Reports (or only Printed or UnPrinted).

If you choose to change selections based on selection criteria, those preferences remain in effect for all Express report functions and services until you change them or reset them to the default.

Because any user on the system may change selection criteria without another user knowing, a check box at the bottom of the Selection Criteria dialog box allows you to always (or never) display the criteria dialog box. This allows you to verify which reports are selected prior to carrying out a view, print, delete, or purge function.

Note: If you choose not to always display the Selection Criteria dialog box, be aware that all available reports may not be selected even though they do exist.

2. Click **"Defaults"** to select all unprinted reports or change the criteria as described below.

Requestor ID

Select a Requestor ID or select All IDs.

Service

Select an Express service or All Services.

User Batch

Enter a User Batch number. If you do not, all batches are purged.

State

Enter a specific state or select All.

Status

Select one of the following options: All Status Codes, Results Found, Clear, Error, or No Hit.

Name, License Number, User Reference

The Last name and the License number must be entered exactly the way the State returned them.
To refine the purge, enter a Name (Last Name, First Name) and/or a User Reference. The License Number and User Reference options are available only for MVR purges.

Print Options

Choose All, Printed, or Unprinted reports.

Date Received

To refine the purge, enter a date range for an approximate time period when the reports were received.

Note: The Defaults button resets selection options to include all unprinted reports.

3. Click **"OK"**. The Purge Reports/Requests dialog box displays.
4. Click **"OK"**. The system displays the number of reports to be purged.
5. Click **"OK"** at the confirmation prompt to permanently remove from your system all reports matching the selected criteria.
6. Click **"OK"** at the completion message box.

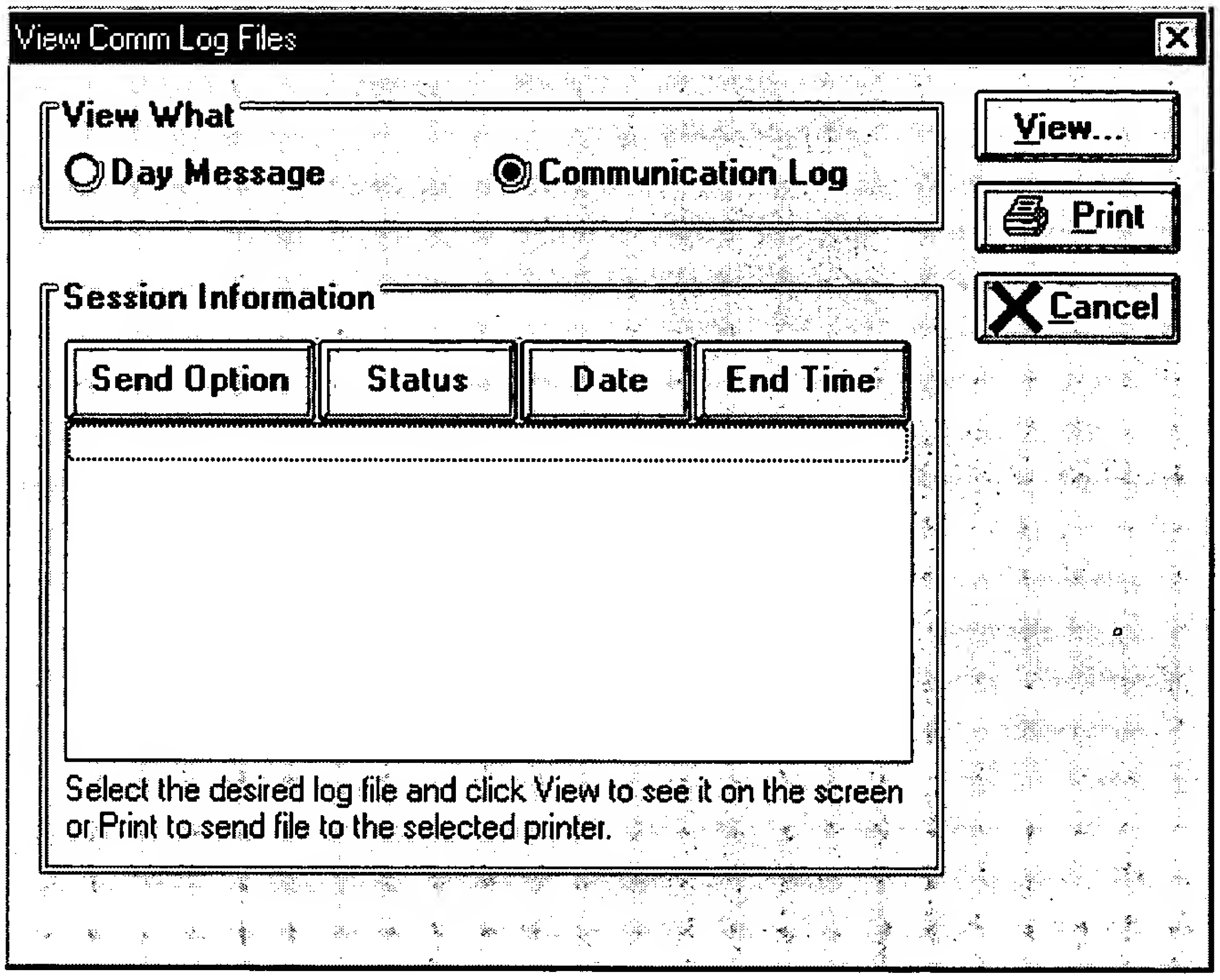
Viewing or Printing the Log Files

The *Communications Log File* is a record of communications with the Data Center. It is used to diagnose problems, and often explains delays in reports due to state or communication problems.

To view or print the contents of a Comm log

1. Select Comm Logs from the Communications menu. The View Comm Log Files dialog box

displays.



2. Choose either Day Message or Communication Log.

3. Select a specific file and click **"View"** to display its contents on screen or click **"Print"** to route the file to your printer.

4. When finished, click **"Cancel"**.

Viewing System Information

This option allows you to view a variety of system information which is useful in day-to-day processing.

The following pages detail

- Account Information
- State Information
- Report Counts
- Request Counts
- User Information

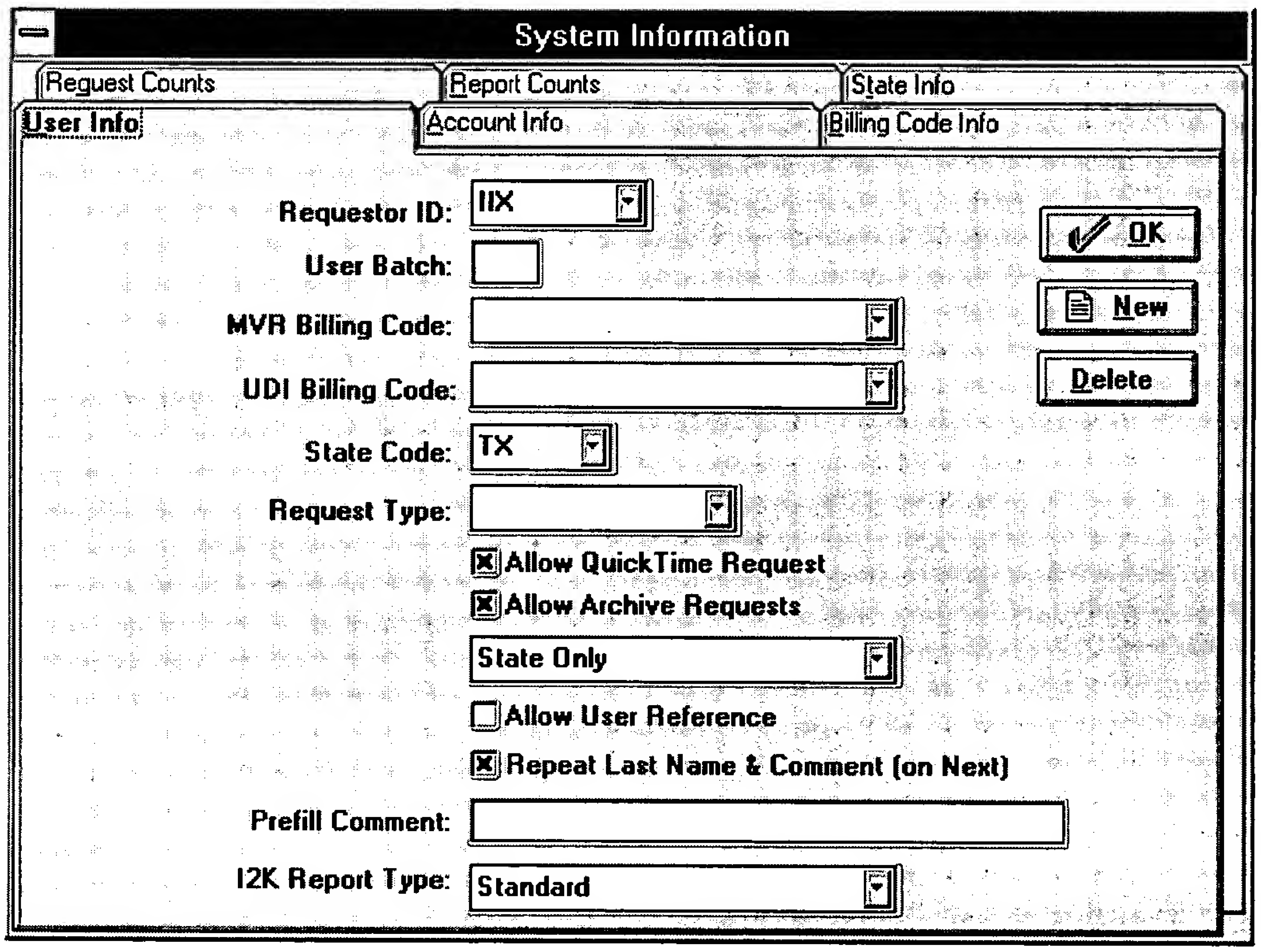
- Billing Codes

Account Info

To view account information

1. Select **System** Info from the View menu.

2. Select the Account Info tab. The Account Info folder displays the account number and password, the account status and type, a CA Requestor ID (if applicable), and various system information.



3. Click **"OK"** to exit.

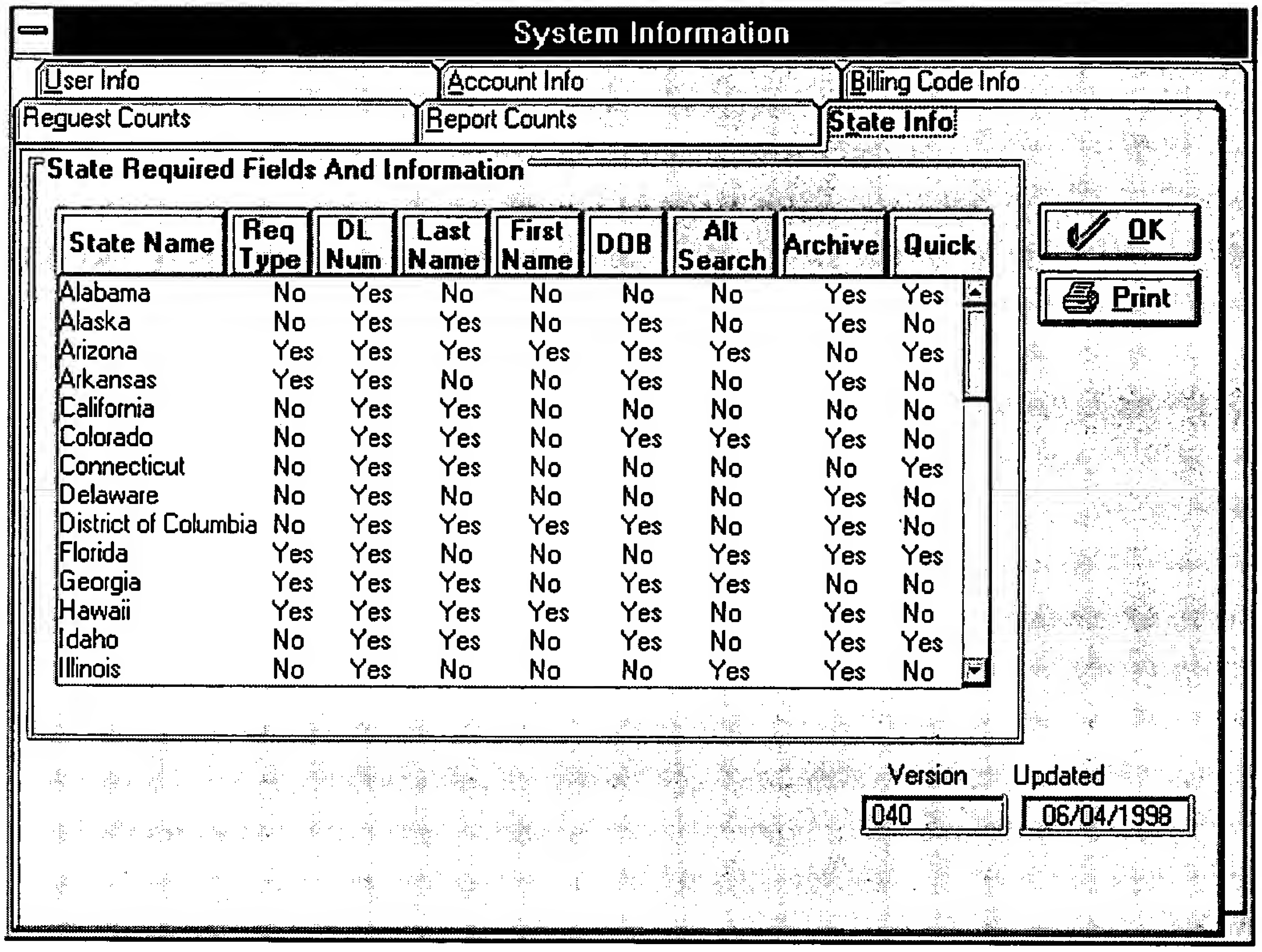
State Info

To view or print state information

1. Select System Info from the View menu.

2. Select the State Info tab. The State Info folder lists each state and whether it requires a

Request Type, Driver License Number, Last Name, First Name, and/or Date of Birth. Alternate searches, archived MVRs, and quick turnaround availability is shown.



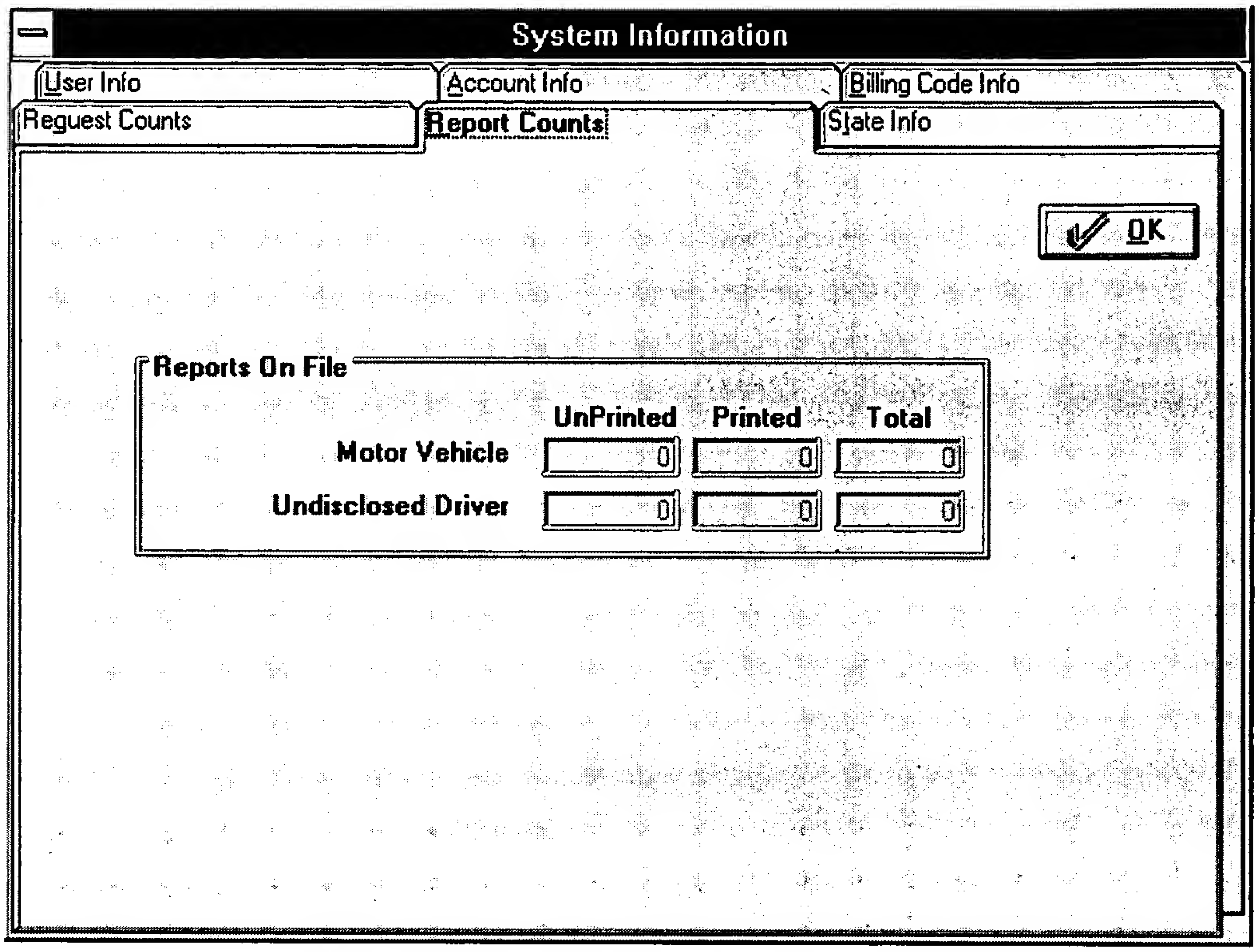
State Name	Req Type	DL Num	Last Name	First Name	DOB	Alt Search	Archive	Quick
Alabama	No	Yes	No	No	No	No	Yes	Yes
Alaska	No	Yes	Yes	No	Yes	No	Yes	No
Arizona	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes
Arkansas	Yes	Yes	No	No	Yes	No	Yes	No
California	No	Yes	Yes	No	No	No	No	No
Colorado	No	Yes	Yes	No	Yes	Yes	Yes	No
Connecticut	No	Yes	Yes	No	No	No	No	Yes
Delaware	No	Yes	No	No	No	No	Yes	No
District of Columbia	No	Yes	Yes	Yes	Yes	No	Yes	No
Florida	Yes	Yes	No	No	No	Yes	Yes	Yes
Georgia	Yes	Yes	Yes	No	Yes	Yes	No	No
Hawaii	Yes	Yes	Yes	Yes	Yes	No	Yes	No
Idaho	No	Yes	Yes	No	Yes	No	Yes	Yes
Illinois	No	Yes	No	No	No	Yes	Yes	No

3. Click **"Print"** to route a copy of the listing to your printer.
4. Click **"OK"** to exit.

Report Counts

To view report counts

1. Select **System Info** from the View menu.
2. Select the Report Counts tab. The Report Counts folder displays the total number of reports for each service currently on file. Additionally, a breakdown displays the number of printed and unprinted reports.



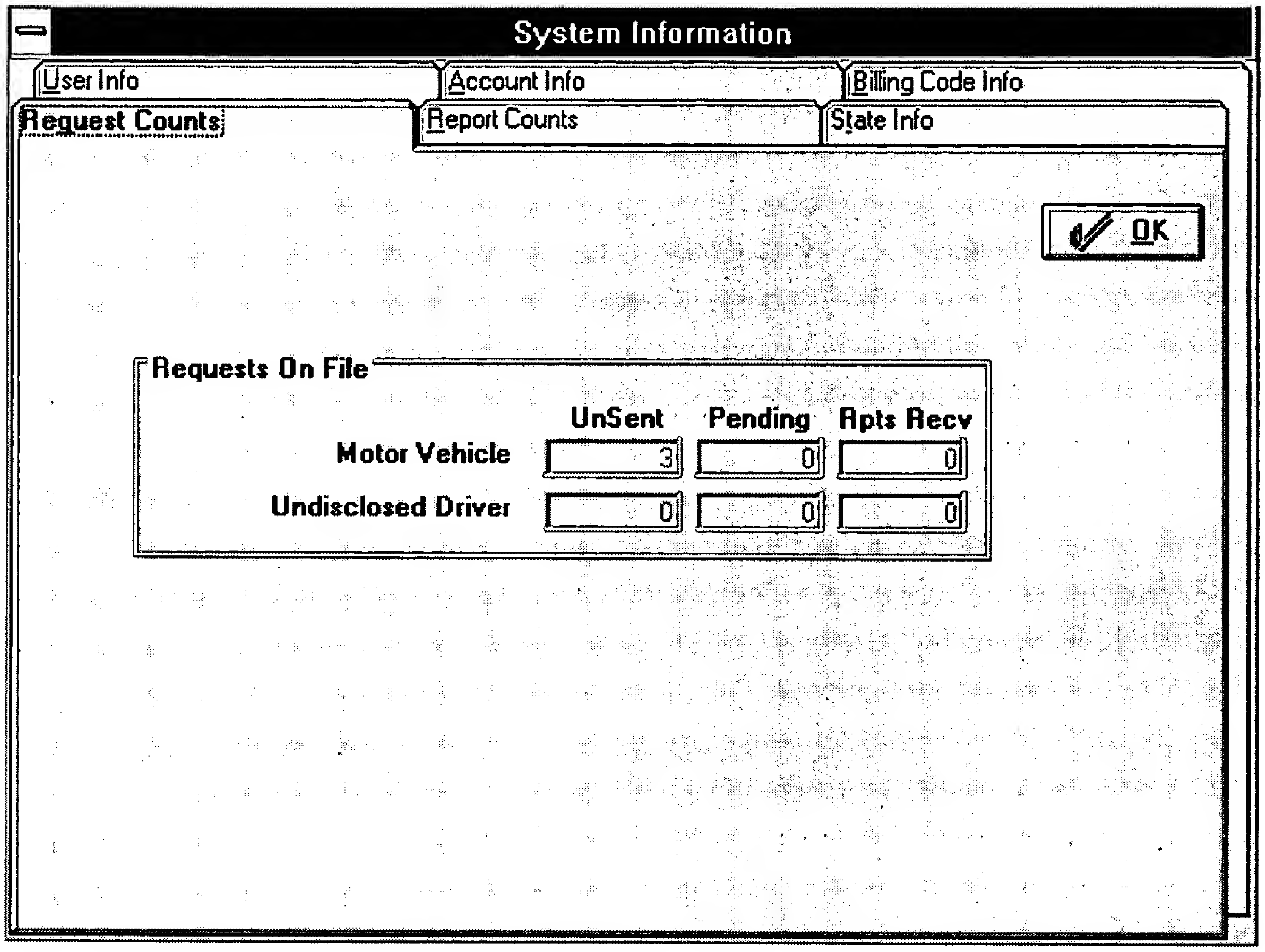
3. Click **"OK"** to exit.

Request Counts

To view request counts

1. Select **System Info** from the View menu.

2. Select the Request Counts tab. The Request Counts folder displays the number of pending and unsent requests. Additionally, the total number of reports received for each service is shown.



3. Click **"OK"** to exit.

User Info

To view user information

1. Select **System Info** from the View menu.
2. Select the User Info tab.
3. See "Request Defaults" in the Express Installation chapter.

Billing Codes

To view billing codes

1. Select **System Info** from the View menu.
2. Select the Billing Code Info tab.
3. See "Internal Billing Codes" in the Billing Features chapter.

Using the Express Messaging Option

The Express Messaging option has, to date, not been activated.

Chapter 3 *Express for Windows User's Guide*

Quick Start Course

Quick Start Course

Part 1 of this chapter is designed to familiarize you with *the basics* of Express for Windows. In it you will find information about

- the menu structure
- the toolbar
- keyboard shortcuts and accelerator keys
- program icons
- the *Express for Windows User's Guide* and online help

You will also find

- a description of user folders and request groups which you will need to understand prior to using Express for Windows; and
- an explanation of the Express selection criteria dialog boxes

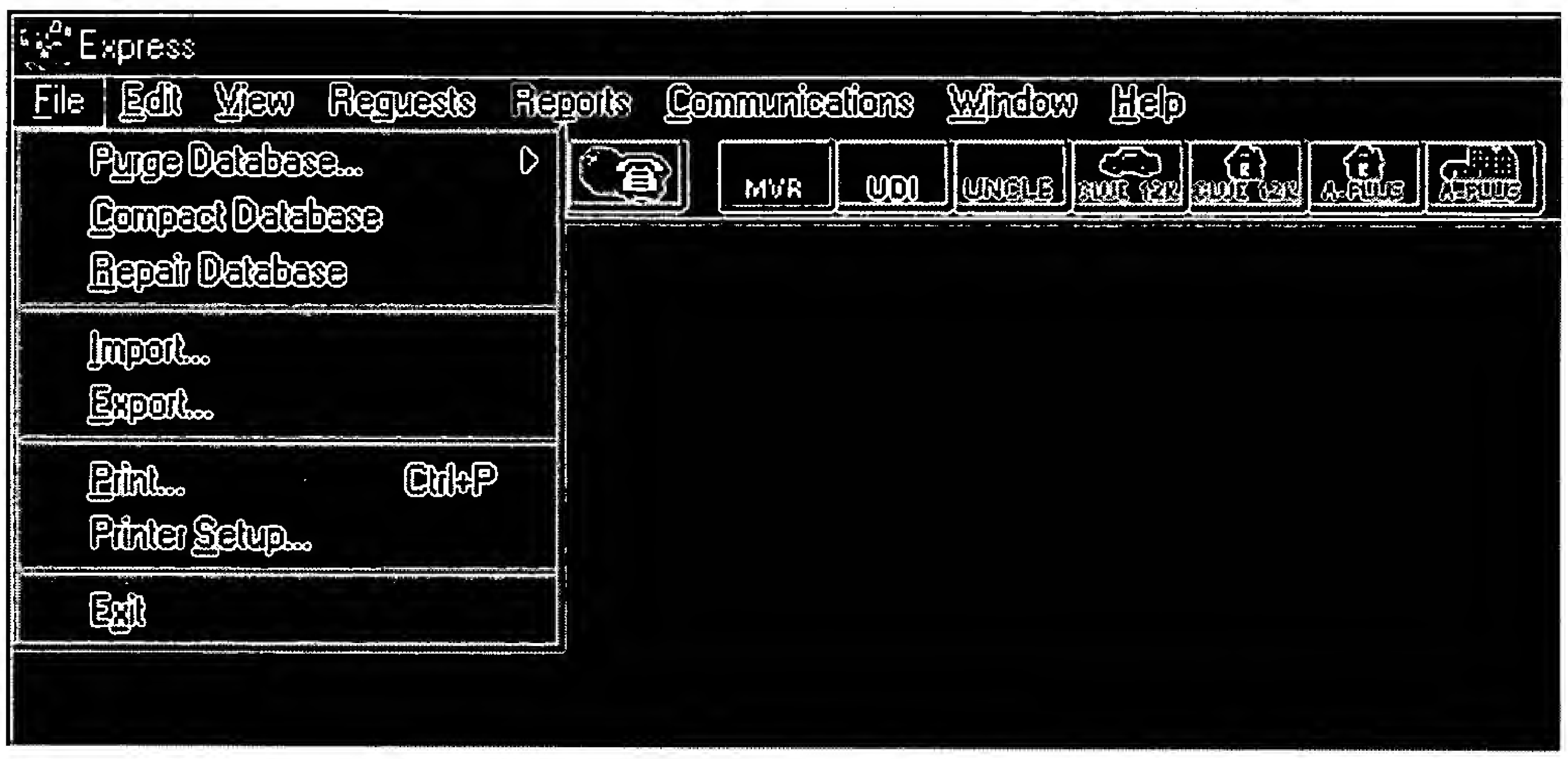
Part 2 of this chapter contains a *series of lessons* designed to get you up and running----using Express for Windows to obtain risk assessment reports as quickly as possible after loading and setting up the software.

Part 1: The Basics

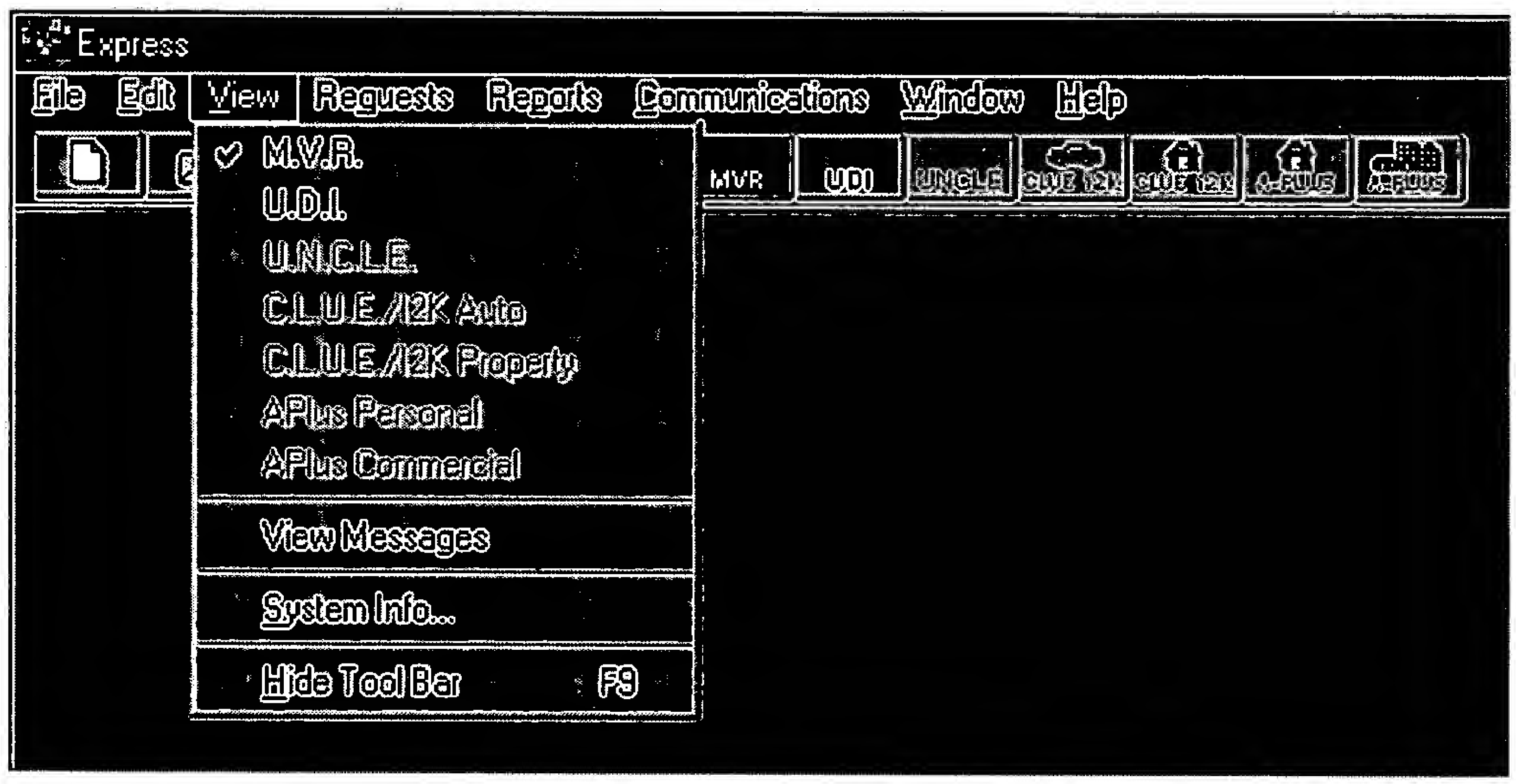
Menu Structure

The following screens show the main Express for Windows pulldown menus and the options available on each.

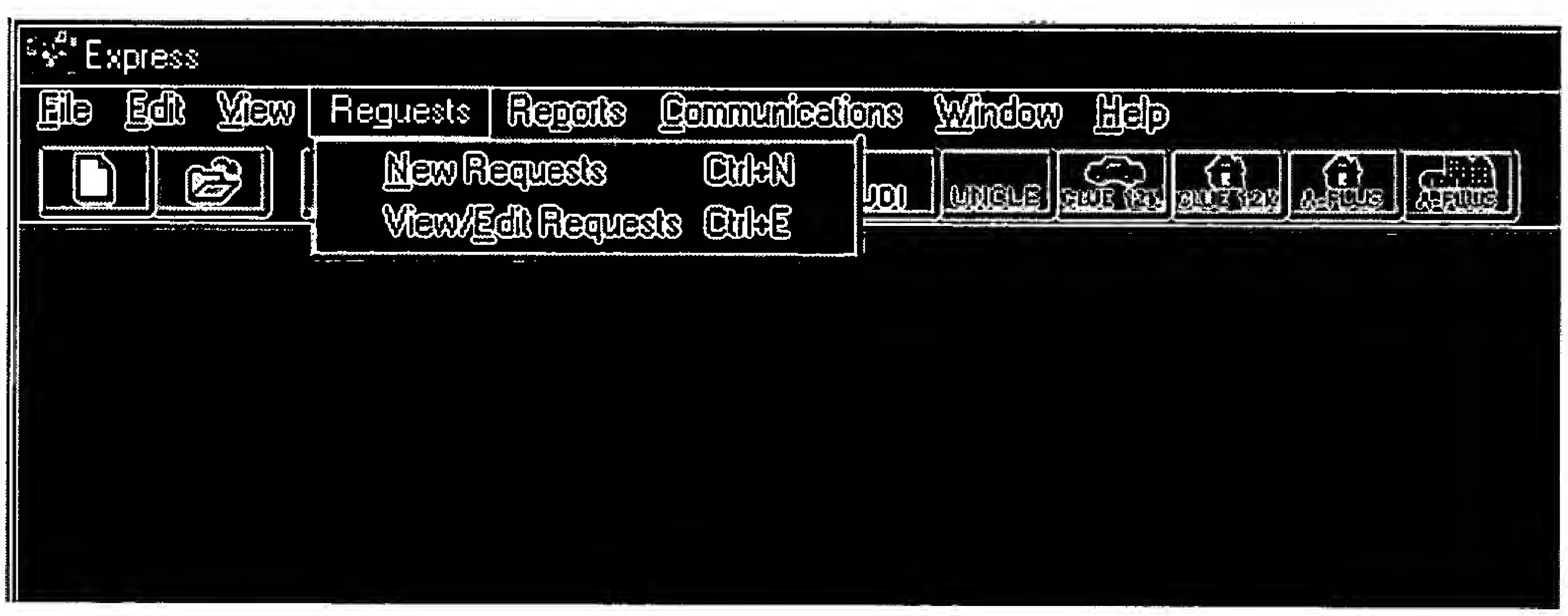
The **File** menu allows you to maintain database files, import and export data, print requests and reports, set up your printer, and exit Express.



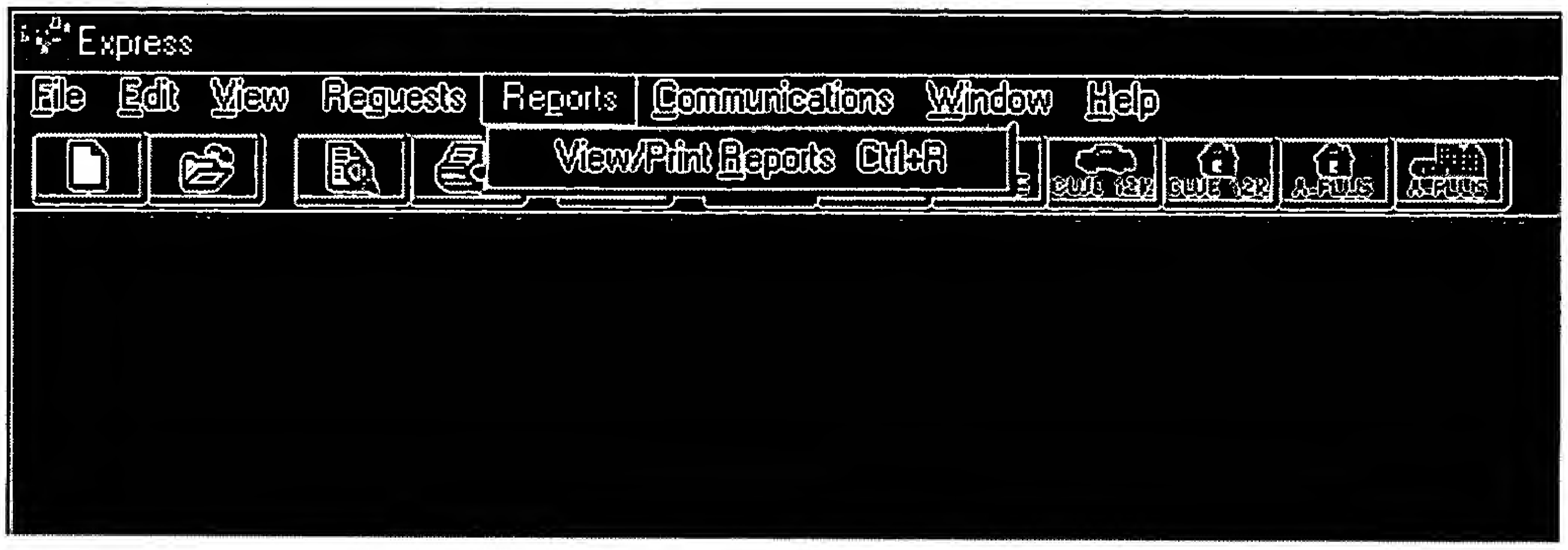
The **View** menu contains options to activate a particular Express service, to view incoming messages, to display system information, and to toggle the toolbar on and off.



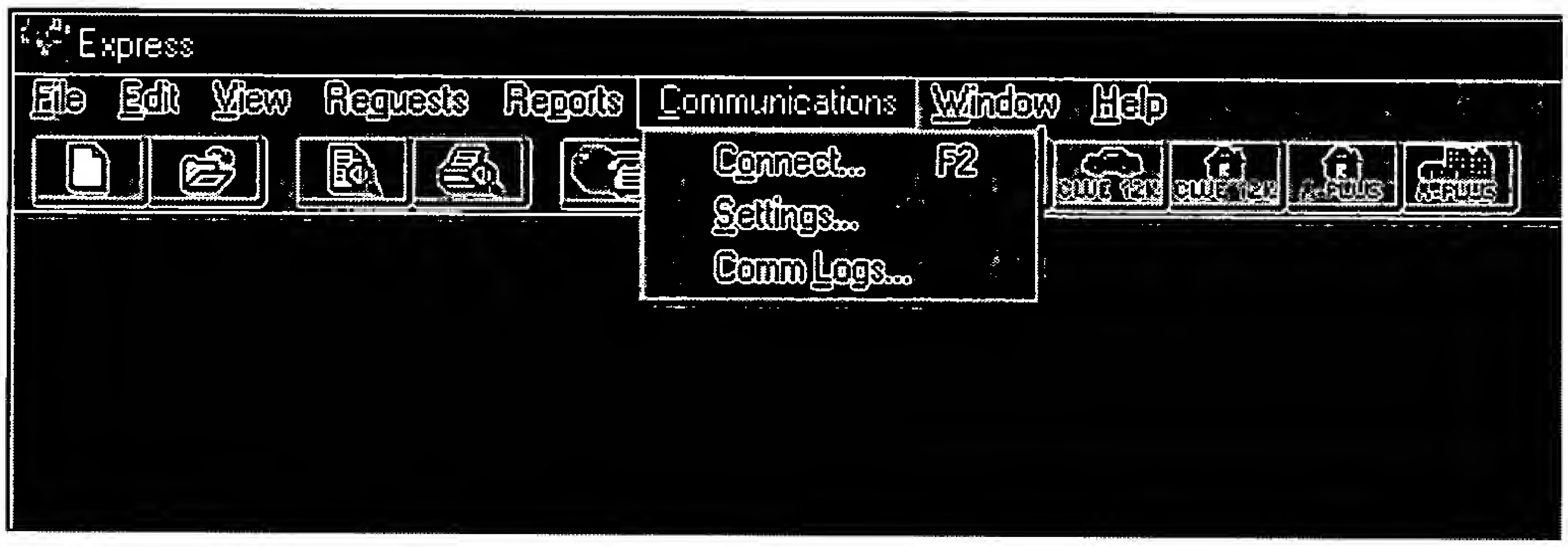
The **Requests** menu allows you to enter new requests or to view and edit existing requests.



The **Reports** menu allows you to view and print reports.



The **Communications** menu contains the option to connect to the Data Center, an option for Settings, and one to view or print communication log files and day messages.



The **Edit** menu provides standard Microsoft Windows cut, copy, and paste functions.

The **Window** menu contains standard Microsoft Window and icon placement functions.

The **Help** menu accesses Express help. The About option displays the Express version number in use.

The Toolbar

The Express toolbar has been implemented for use with a mouse to speed access to the most frequently used menu options.

The toolbar is optional and may be removed from the screen by selecting the Hide ToolBar option from the View menu. It may be redisplayed by selecting the **Show ToolBar** option from the View menu.

All sample screens in this manual show Express with the toolbar removed.

The toolbar may be positioned at the top, bottom, left, or right edge of the screen, or it may "float"anywhere in the workspace. The boundaries of the toolbar are delineated by two thin lines lines at either end. Click within these lines (ideally, between sets of option buttons) to grab the bar. While holding the left mouse button down, move the bar to a different location then release the mouse button. Move the toolbar completely to the right, left, top, or bottom of the screen then release the mouse button to position the bar along the edge of the screen. Double-click on the title bar or on an open area of the toolbar to position it at its previous location.

Keyboard Shortcuts

Besides using the mouse and toolbar icons to navigate Express, you may use standard keyboard shortcuts. The chart below presents frequently-used navigational keys.

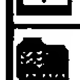
KEY	RESPONSE
F1	displays HELP messages
ENTER	selects an option or function
↑ ↓	positions the cursor
ESC	exits a screen or dialog box
TAB	moves forward from current field to next field
SHIFT-TAB	moves backward from current field to previous field
CTRL-DEL	erases entire line in a data field

Accelerator Keys

Additionally, each Express menu and each input field on every screen has *accelerator keys* (an underlined letter) which (when pressed with the Alt key) moves focus to that menu or that input field. The options on each menu may be accessed directly by pressing the underlined letter or by the Ctrl+key combination shown on the menu.

List Box Icons

The following graphics display in Express request and report list boxes, and inform you of the status of that item.

	Request has not been sent
	Request has been sent
	Request is being viewed or edited
	Request contains "bad" data
	Report for request has been received
	Report has been printed

Using the Manual and the Online Help

Besides Customer Support, iiX provides this detailed user's guide and online help when you have problems with Express for Windows.

- If you're new to Express for Windows... iiX suggests that after you install the software, you read through this "Quick Start Course" to obtain the basics for running and using the software. After that, skip to any one of the service chapters MVR, UDI, Claims (see chapter links at left) or to other Express chapters to read step-by-step procedures.

- If you've used Express before... iiX suggests that you read the Release Notes included in your installation guide to familiarize yourself with the new features and fixes which have been made since the previous release of Express.

- If you get "stuck"... iiX recommends that you check the "Index" of the Express for Windows User's Guide first or simply press F1 at any location in the software to call the context-sensitive help which contains quick procedures to guide you through a particular operation. You may also select Contents from the Express Help menu to view the overall help content.

- If you're still stuck... Feel free to call iiX Customer Support at 800-683-8553.

Understanding User Folders/Request Groups

Beginning with Version 2.1, Express for Windows introduced a new approach which opens the door for obtaining and sharing business information across wider boundaries than ever before. To accomplish this, a User Folder/Request Group concept has been implemented. The following information introduces that concept and shows how it can optimize the services offered by Express.

What is a User?

Users and User IDs have always been associated with Express products. Generally, a regular user of the system is set up with his own ID and has, associated with that ID, certain request defaults.

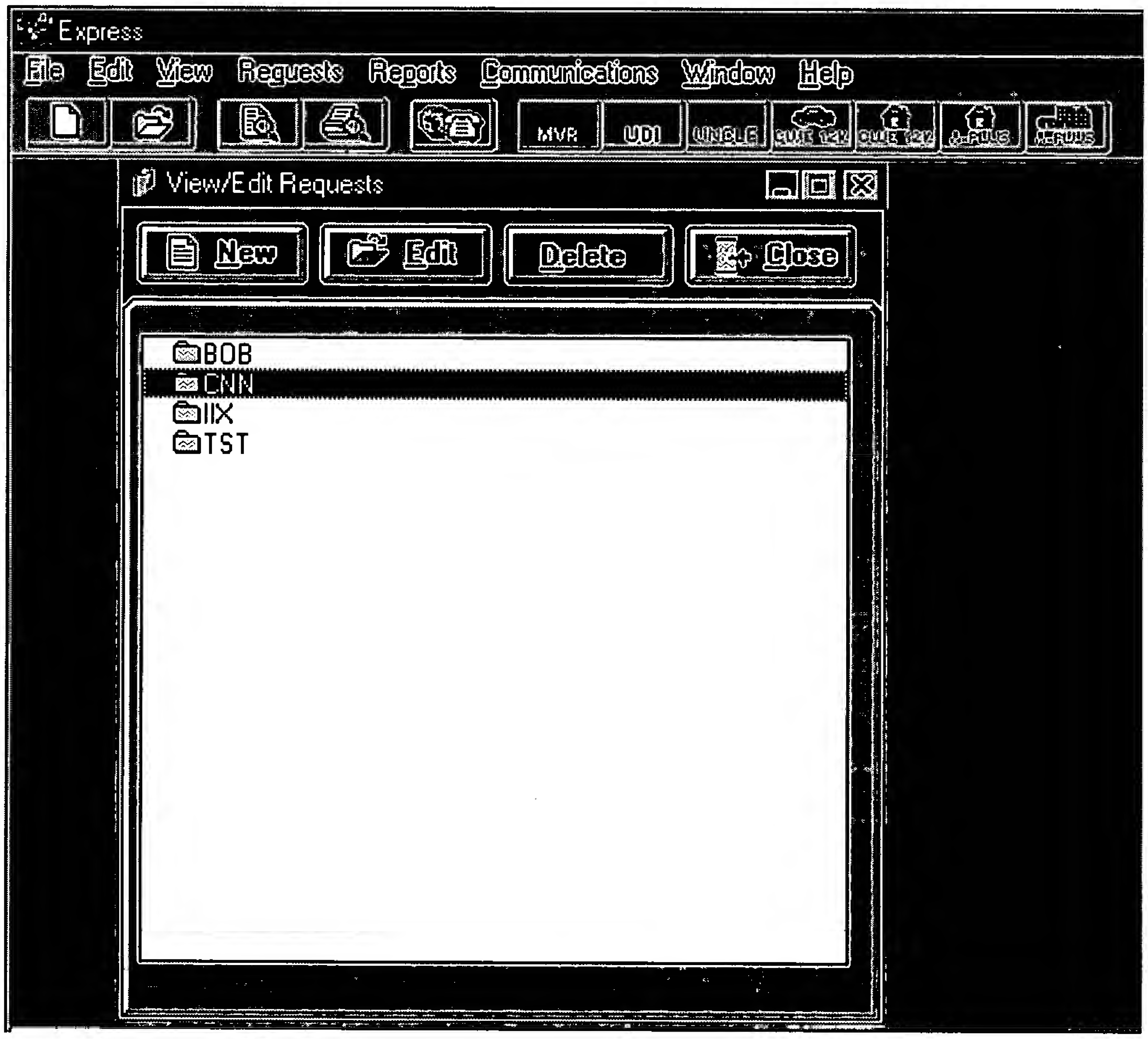
The User Info folder within the System Info option displays the defaults which may be set for each user. When the user works with Express under his User ID, his pre-defined responses default where appropriate on Express entry screens.

Additionally, User IDs are printed on all requests/reports associated with a particular user so that a particular user, in a sense, "owns" certain requests and reports. This is evident in the options which allow requests/reports to be selected by User ID.

What is a User Folder?

User folders are shown in the View/Edit Requests list box displayed when you select the View/Edit Requests option or after you save a new request group. Similar to the Windows File Manager/Windows Explorer/Windows Explorer/Windows Explorer, the Request List shows all Express users, by assigned ID, in a directory-tree structure.

A file folder icon marks each User ID in the same way that a folder icon in File Manager/Windows Explorer/Windows Explorer/Windows Explorer marks each directory. When users are added to or deleted from within the System Info option, the corresponding IDs (i.e. folders) are added or deleted from the Request List.

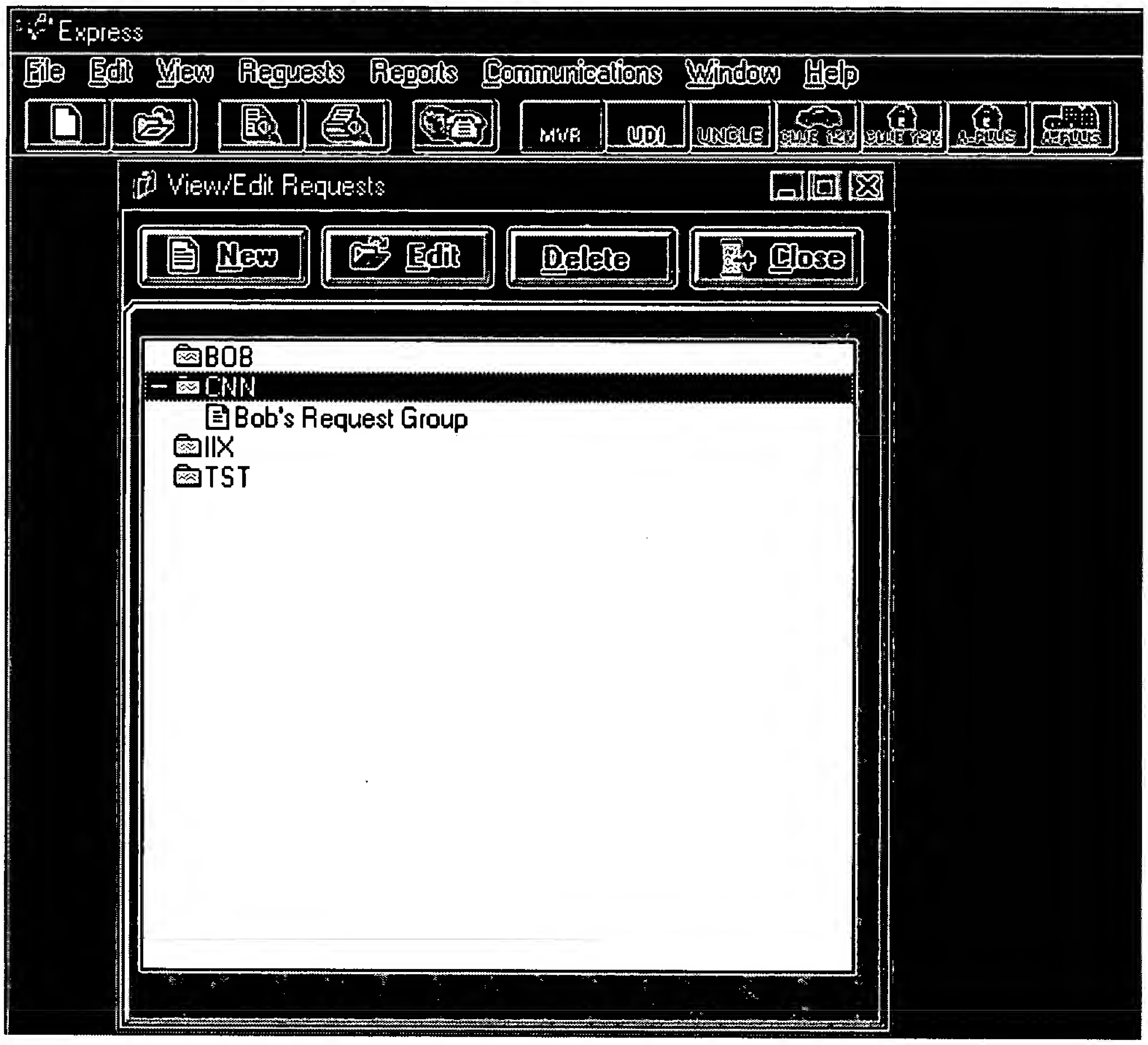


Each folder holds or stores any number of request groups that the user enters into the system. Similar to the Windows File Manager/Windows Explorer/Windows Explorer/Windows Explorer Expandable Branches option, a plus (+) sign marks closed user folders which contain requests. When a folder is opened, the plus sign changes to a minus sign (-).

What is a Request Group?

When you add a single request or multiple new requests, you may assign a name or description to that request group. The entire group or batch of requests is then "filed" in your user folder.

The Request List shows each request group in a sub level to the user folder. A document file icon marks each group in the same way that a document file icon in File Manager/Windows Explorer/Windows Explorer/Windows Explorer marks each file in a directory. Using this structure, the User Folder/Request Group concept allows you to organize requests for easy reference.



Understanding Selection Criteria

Express for Windows provides you with risk assessment reports (by service) which you obtain from iiX by submitting request information. Therefore, when you work with Express, you are working primarily with requests or reports.

Each service chapter in this guide goes into detail describing the two Express **selection criteria** dialog boxes. This section explains when you will encounter those dialog boxes and why you need to know about them.

Why use selection criteria?

In the past, Express users have asked for a "filter" capability to limit or to select only specific requests and/or reports they want to work with in a particular situation. Because of this, selection criteria dialog boxes were created. Depending on the service you select (MVRs, UDIs, or one of the Claims services), you may choose from a number of criteria to select only the

requests or reports you want----thus filtering out others----before you perform one of the functions listed below.

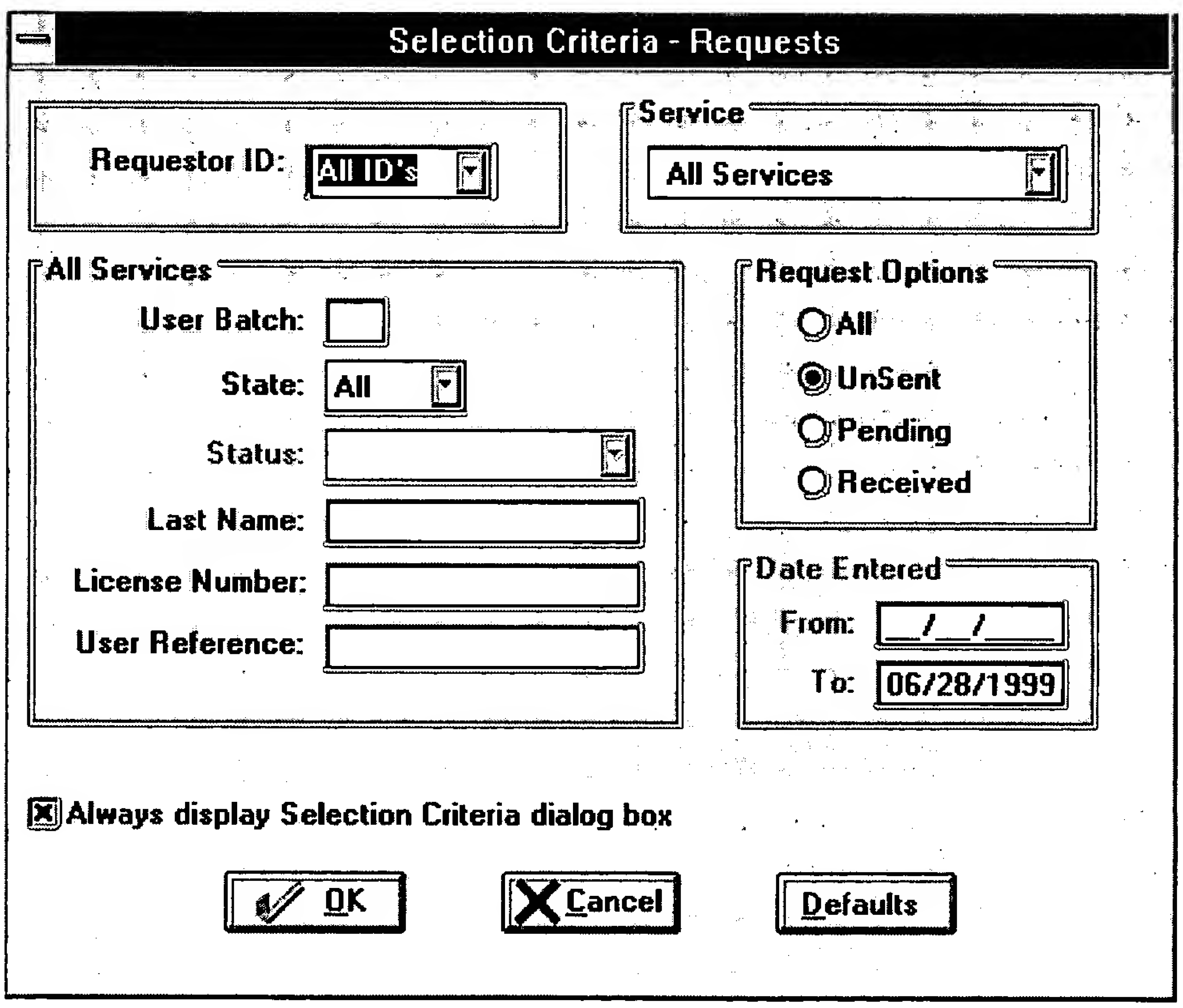
When you manipulate requests or reports, you select them all or only ones you want to work with before you select an Express function:

- For requests, you may select a specific group to **print** or **purge**.
- For reports, you may select a specific group to **view, print, delete,** or **purge**.

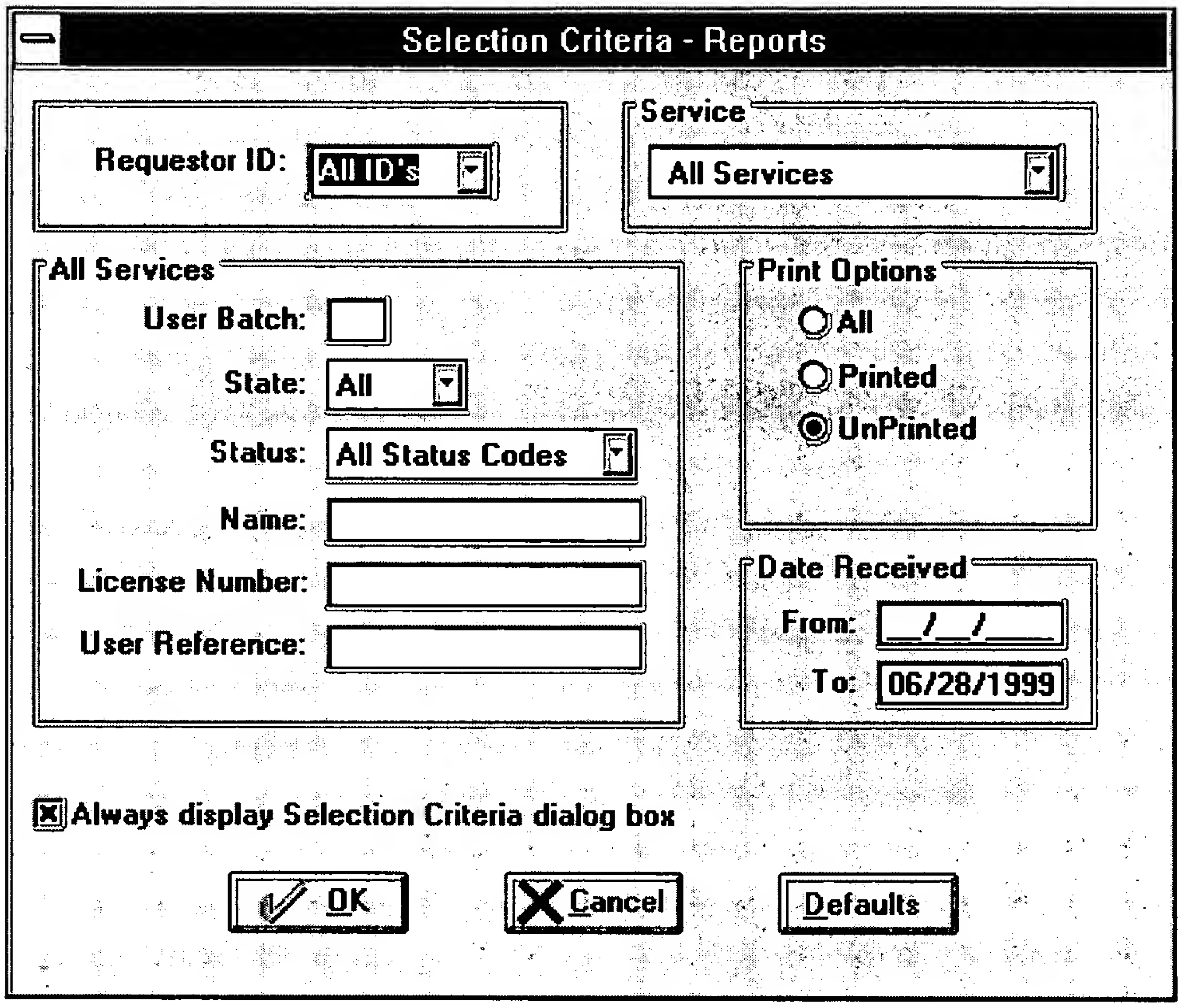
Why verify selection criteria?

The following screens show the default settings for requests (all unsent) and for reports (all unprinted) as well as the other criteria you may choose to change the defaults.

For requests:



For reports:



When you (or anyone else in your office using the Express system) change the defaults in either of these dialog boxes, those changes are set for any request print or purge function *regardless of selected service* and/or for any report view, print, delete, or purge function *regardless of selected service*.

EXAMPLE: What this could mean is that when you

- print a request listing: all requests might not be listed;
- purge requests: all requests might not be purged;
- view or print reports: all reports might not be shown in the Reports list box and/or therefore all reports might not print;
- delete or purge reports: all reports might not be deleted or purged

For this reason, a check box is included at the bottom of both selection criteria dialog boxes which allows you to always (or never) display the selection criteria prior to performing those functions mentioned above. If you choose to display the criteria each time, you can make sure that all requests and/or reports are included (or not if you choose differently) before you carry out one of the command functions.

Because this is an important concept, procedures for choosing request and/or report selection criteria are explained in the request and reports section of each service chapter in this user's guide.

Part 2: Getting Started

☹So you don't want to read the entire manual.

Well, this is a "crash course" in using Express for Windows!

Basically, you'll need to know how to do these things to obtain Express reports:

- enter request information
- prepare a list of requests prior to transmission
- communicate with iiX to transmit request data and to pick up ready reports

Then, if you want to do more without reading the manual, learn how to:

- view new reports
- print reports

☺ ***You can do this! When you're ready, go to the next section...***

There are four processing stages for using the Express services. The first three are detailed in the following lessons.

Entering Request Information

Specific data is required for each type of request. You provide this data by entering it in dialog boxes (see Lesson 1). You also may import specially structured data (i.e. read/write it from a file) into the Express system (see the Utilities chapter).

Transmitting the Request/Receiving the Report

The Express Communications option provides a method to send request information to the iiX Data Center for processing and methods to electronically pick up or receive the processed reports. (see Lesson 3).

Printing the Report

When a report has been received, Express Print options allow you to produce "hard copy" print-outs of the report (see Lesson 5).

Deleting the Report

After a report is printed and it is no longer needed, it may be deleted. And, the Purge function allows you to permanently remove old reports from your system (see individual service chapters and the Utilities chapter).

> **Note:** The following lessons may be completed by entering test or "dummy" data under the demo account number 999999. This account is already set up in the software when Express is shipped to customers. Requests entered under this account number may be sent to the iiX Data Center but they will not be processed or billed to your Express account. All test requests entered and transmitted will be marked as sent; however, they will need to be deleted or purged at a later time to remove them from your system.

Lesson 1: Entering and saving request information

When you decide what kinds of reports you need for client or prospect risk assessment, and have all the pertinent information available to request reports, you're ready to get started!

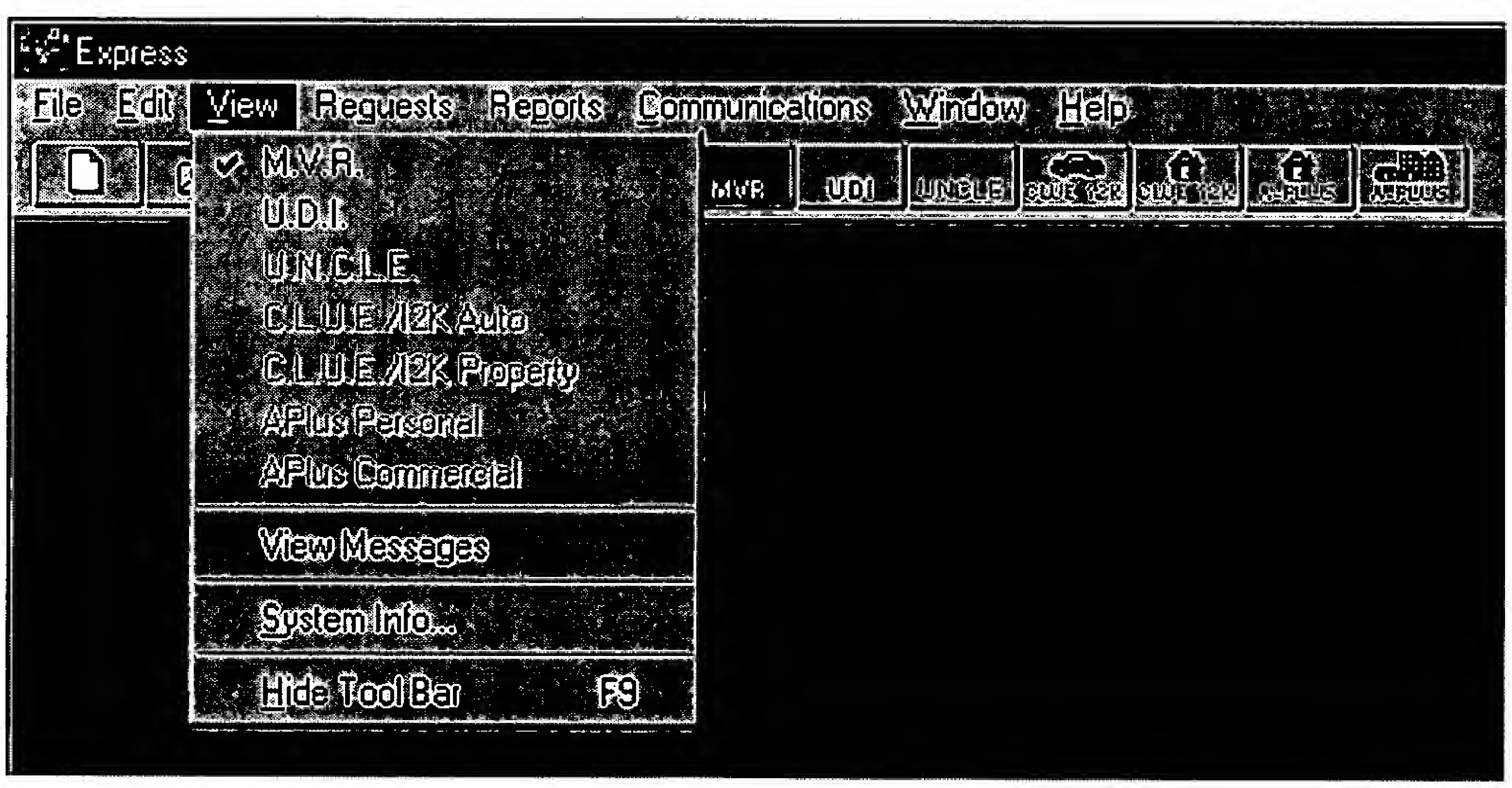
1. Start **Express for Windows**.

2. You must first select all the services you want to use (or are authorized to use). If you only want MVRs, don't select the other services. But if you need UDIs and Claims reports, select those----or any combination of Express services!

To do this, **either**

- click on the service icon(s) on the toolbar...

- or click on the service name(s) from the View menu...

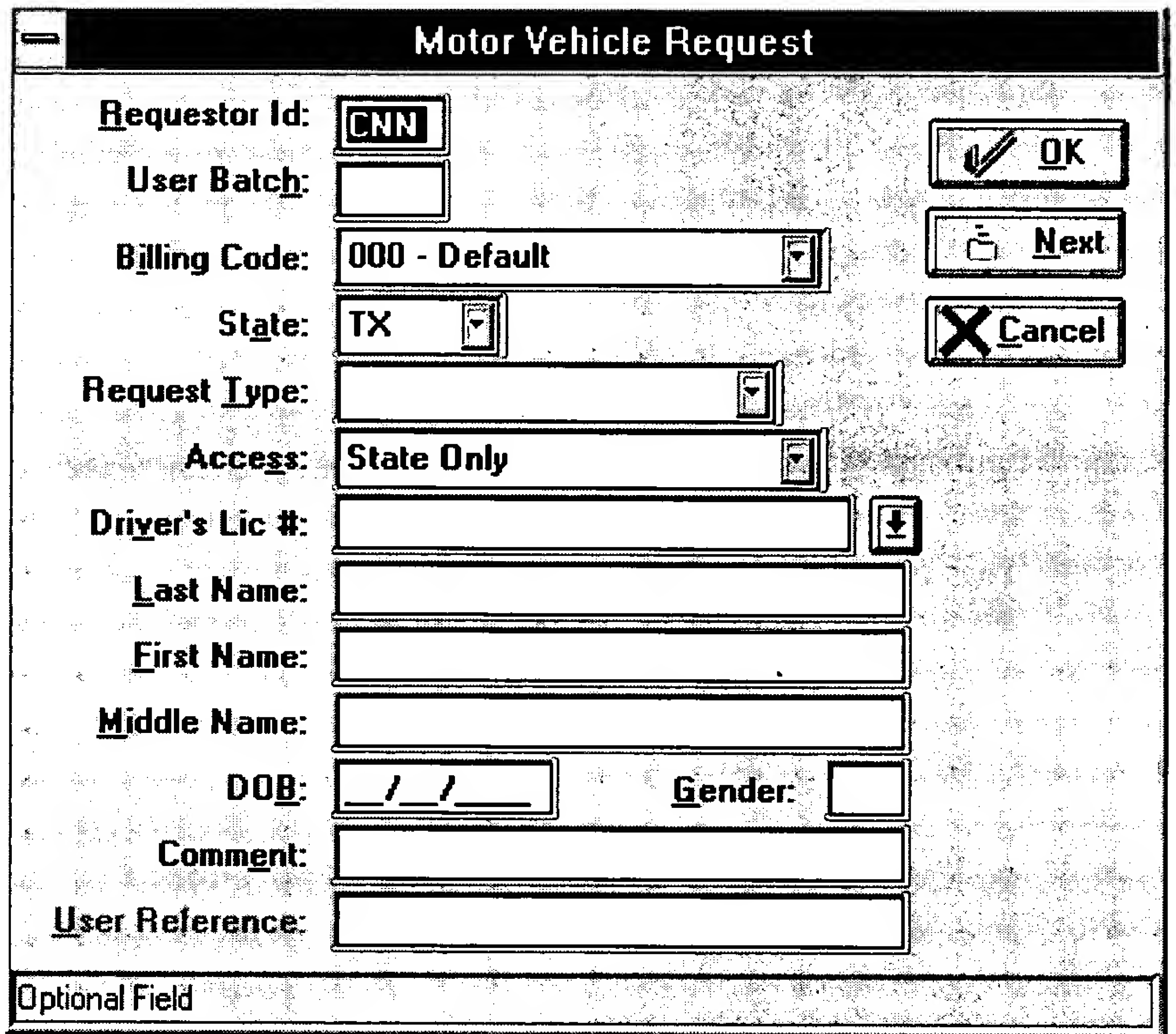


3. Click on the New Requests icon in the toolbar (or select **New Requests** from the

Requests menu). According to the service(s) you have selected, one of two screens (discussed below) will display next. Follow the instructions below the screen name which displays on your screen.

The Request Entry Window

If MVR is the only Express service selected, the Motor Vehicle Request window displays.



4. Tab to, and fill in, test data at all or just the required fields in the Motor Vehicle Request dialog box. (The prompt line at the bottom of the window tells you if a field is mandatory or optional).

If you need help for specific data fields in any Express dialog box:

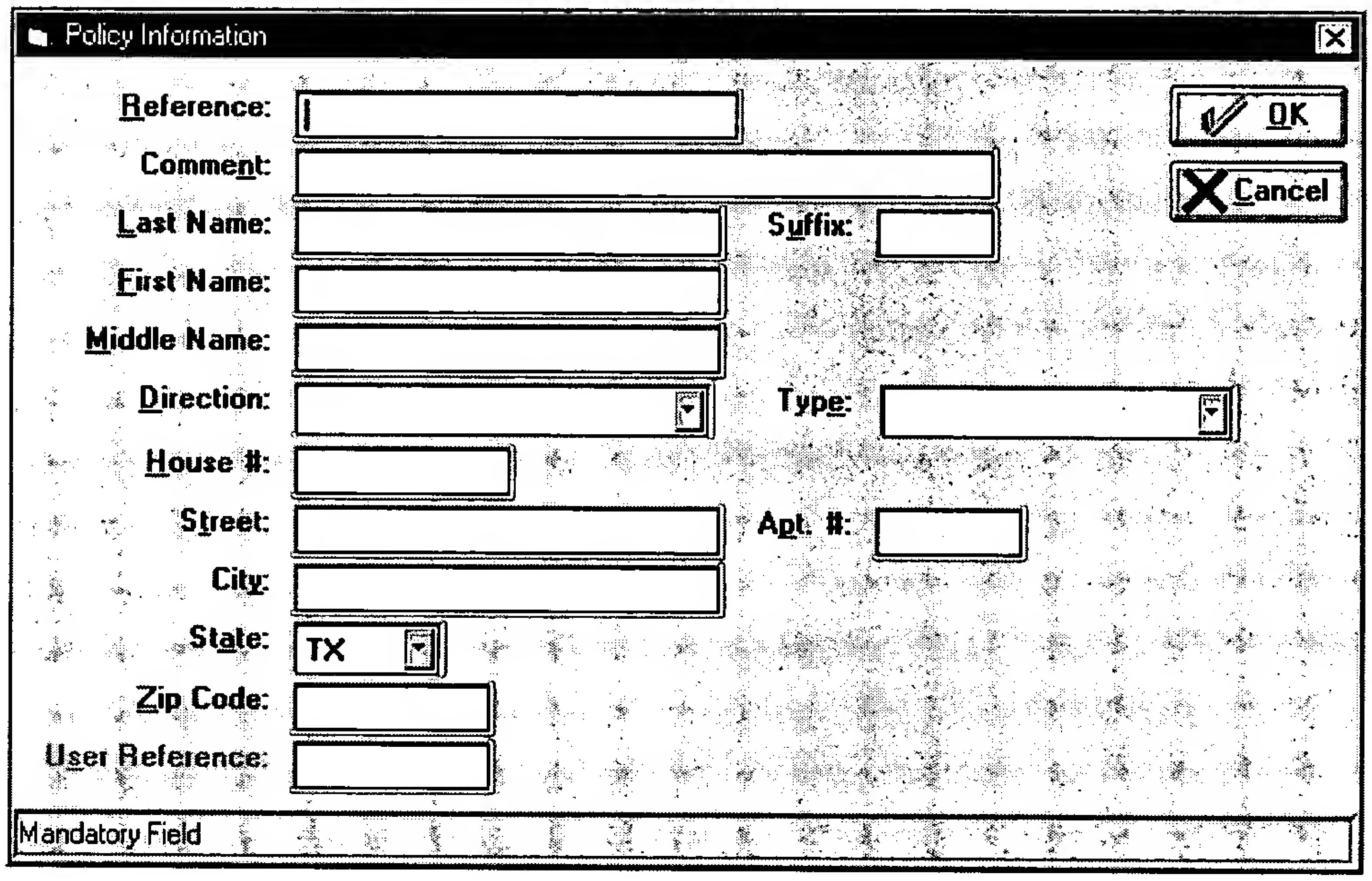
- Press **"F1"** to display the help feature; or
- Check that service chapter in the on-line help!

5. When you've finished entering test data on the request form, click **"OK"** to return to the Request Entry window. The new request is shown in the list box.

6. Click **"OK"** at the top of the Request Entry window. When the Group Description dialog box displays, skip to "Saving the Request."

The Policy Information Dialog Box

If an Express service(s) other than MVR (or the MVR service plus another Express service) is selected on the View menu, the Policy Information dialog box displays.



4. Tab to and fill in test data at all or just the required fields in the Policy Information dialog box. (The prompt line at the bottom of the window tells you if a field is mandatory or optional).

If you need help for specific data fields in any Express dialog box:

- Press **"F1"** to display the help feature; or
- Check that service chapter in the on-line help!

5. When you've finished entering test data in the Policy Information dialog box, click **"OK"**. The Request Entry window displays with tabs, down the right side of the dialog box, for each selected service.

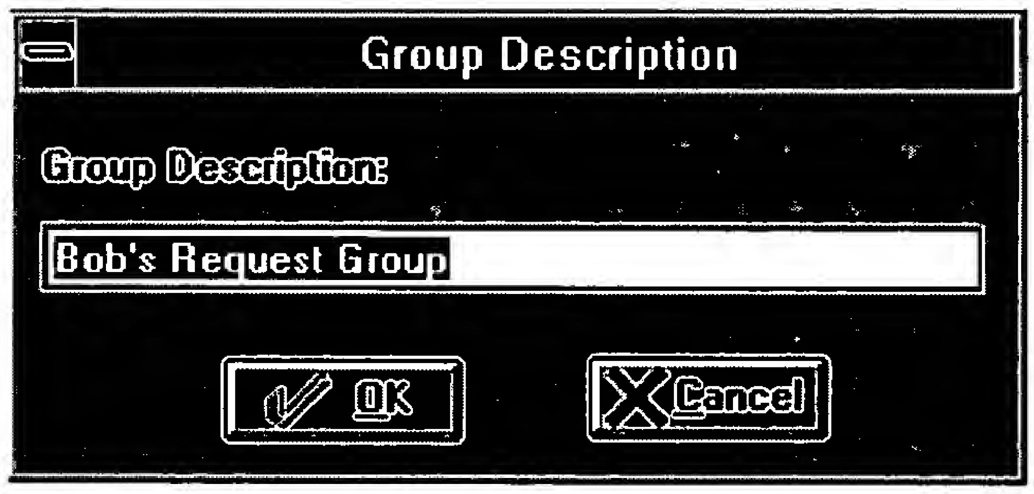
6. Click on each of the selected service tabs one by one and enter at least the mandatory data requested for that service(s). You will need to click on the tabs which display request list boxes to access the corresponding request form.

7. When you've finished entering test data for all selected services, click **"OK"** on each individual request form then click **"OK"** at the top of the Request Entry window. The Group Description dialog box displays; continue with "Saving the Request."

Note: If you decide not to request a report for a selected service, you must de-select it from the View menu or you will not be able to save the request group with that tab displayed.

Saving the Request

If you enter only MVRs, the default name in the Group Description dialog box is *Untitled Request Group*.



If you enter Claims and/or UDI requests the group name defaults to the contents of the Reference field. Either default may be changed.

1. For this lesson, type Test Requests as the description name in place of the default.

HINT: Normally you should enter a description which helps identify what requests are included in the group. This description should be meaningful because it will be listed in the View/Edit Request window under your user folder.

2. Click **"OK"**. The View/Edit Requests window displays the new request group (named Test Requests) under your User ID folder.
3. Click **"Close"** to exit the option.

Lesson 2: Preparing a list of requests

Before you transmit requests to the iiX Data Center

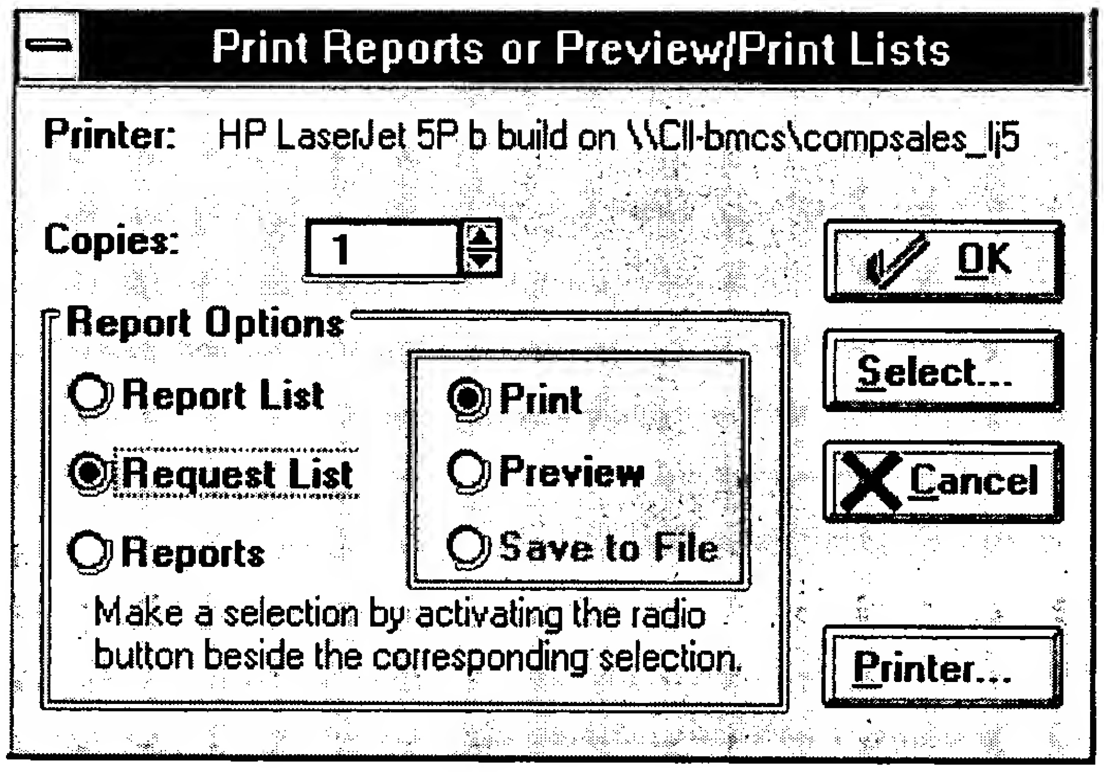
- check the current "Turnaround Schedule"
- print a list of requests prior to transmission

These steps will inform you of the normal turnaround time including request cut-off times and expected report ready times. Printing a list of the requests you send in provides a record of which requests you sent on what date.

1. Click on the Print button in the toolbar (or select **Print** from the File menu).

2. If the Selection Criteria dialog box for Reports displays, click **"Cancel"**. If the Print Reports or Preview/Print Lists dialog box displays, continue with Step 3.

3. Select the Request List option button in the Print Reports or Preview/Print Lists dialog box (not the default Reports button).



4. Click **"Select"** to display the Selection Criteria dialog box for Requests.

5. Click **"Defaults"** then click **"OK"** to return to the Print dialog box.

6. Make sure the Print option button is selected and the Copies field is set to 1.

7. Click **"OK"**. The request listing is routed to your printer.

Lesson 3: Communicating with the iiX Data Center

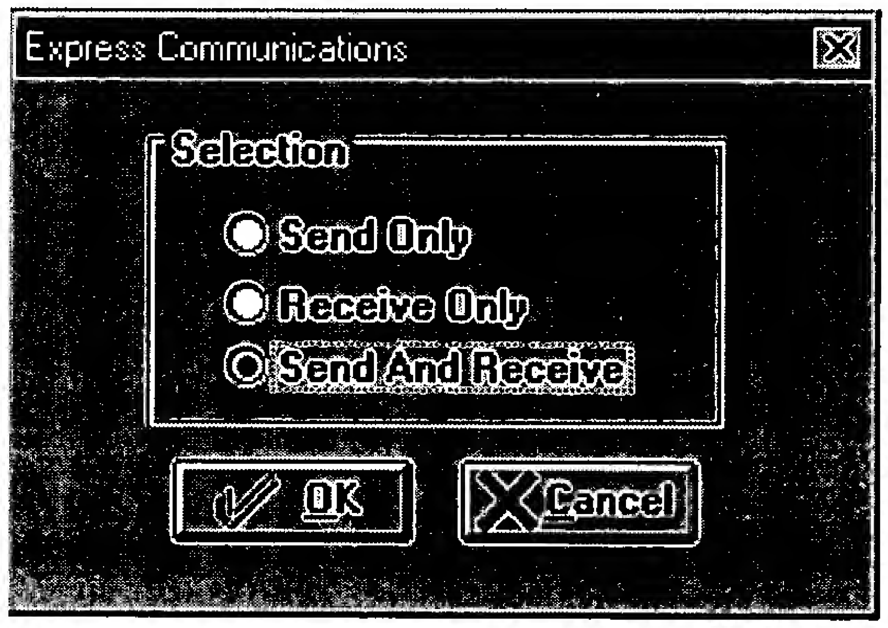
When you have entered all the request groups for the Express reports you need, you are ready to "send" them to the iiX Data Center for processing. *Remember test requests entered under demo account 999999 will be sent but will not actually be processed.*

Note: You may not initiate a communications session if the View/Edit Requests list box is open on your screen or if you have any Express folder open for request entry or editing; the Communications option on the menu and on the toolbar will appear disabled. If other users on the system have open folders, you will be notified. Only valid, saved requests in closed folders are considered "ready" and will be sent.

Sending Requests

1. Click on the Connect button in the toolbar (or select **Connect** from the Communications menu).

2. Click **"OK"** at the FCRA Warning screen. The Express Communications dialog box displays.



3. Select Send Only to just send requests then click **"OK"**.

> **Note:** Pending reports are not downloaded to your system using this selection. Select "Send And Receive" to send in new requests and to receive any pending reports in the same Communications session.

The software initializes the modem and communicates with the Data Center. Many messages display on screen. A successful communications message should be displayed when all requests are sent without problems.

4. Check your "Turnaround Schedule" to determine when reports are scheduled to be ready for pickup, then continue with the instructions on the next page.

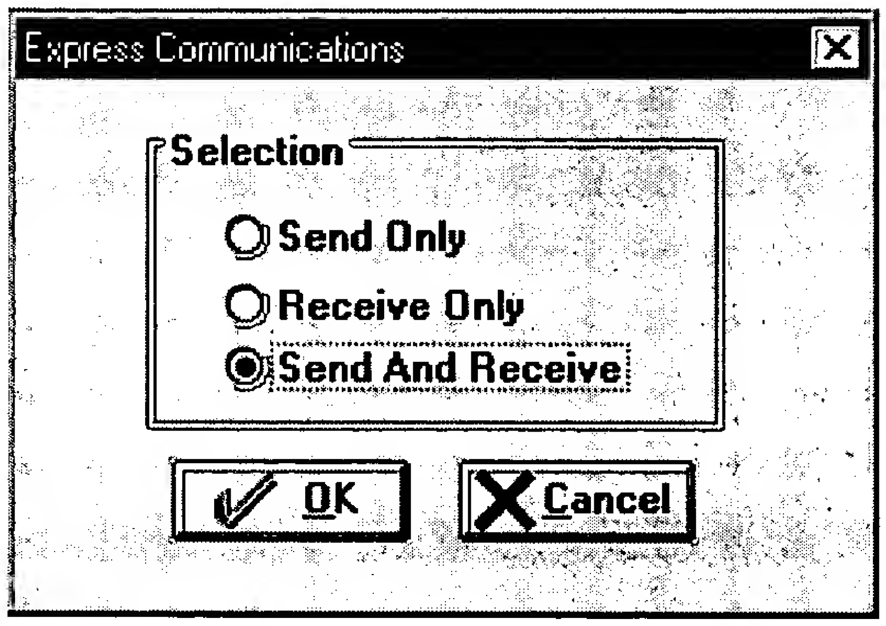
Receiving Reports

Most reports are ready for pick up the next day but some might be ready the same day they are requested. Others take longer; check the "Turnaround Schedule" for details.

When you are ready to initiate a second Communications session to "receive" reports, follow the steps below. Remember test requests were actually sent but not processed; therefore, you will not receive reports back using demo account 999999.

1. Click on the Connect button in the toolbar (or select Connect from the Communications menu).

2. Click **"OK"** at the FCRA Warning screen. The Express Communications dialog box displays.



2. Select **Receive Only** to just download pending reports to your system.

> **Note:** Requests are not sent using this selection. Select "Send And Receive" to send in new requests and to receive any pending reports in the same Communications session.

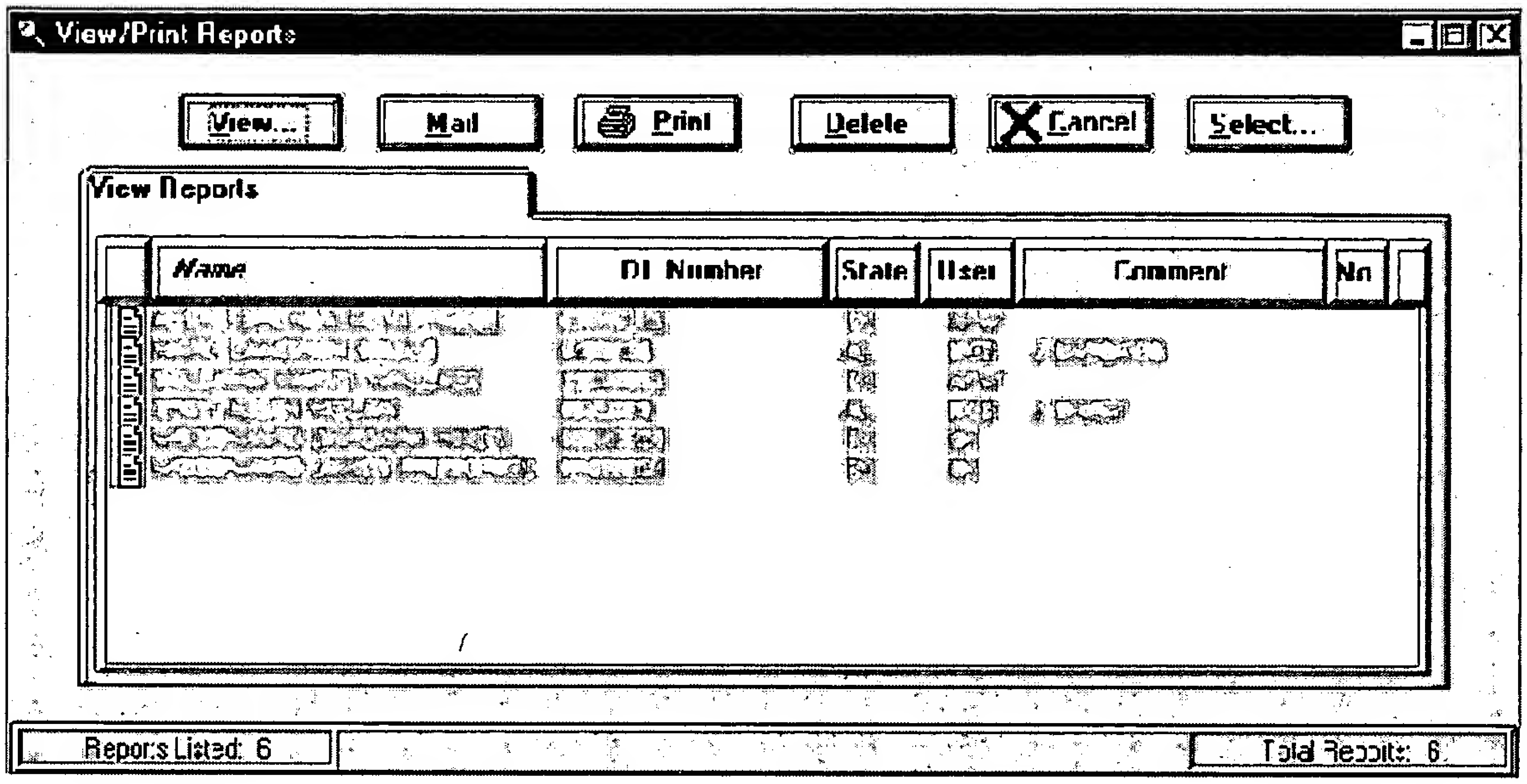
3. For this lesson, click **"Cancel"** since you will not receive reports from iiX using the demo account. In an actual situation, you would click **"OK** to start the communications session.

Lesson 4: Viewing reports

1. Click on the View/Print Reports button in the toolbar (or select View/Print Reports from the the Reports menu).

- If the Selection Criteria dialog box displays, click **"Defaults"** then click **"OK:**. The software loads any unprinted reports; skip to Step 4.

- If the View/Print Reports list box displays, the software loads any reports according to previous selection choices. Continue with Step 2.



2. Click **"Select"** to display the Selection Criteria dialog box for Reports.

3. Click **"Defaults"** then click **"OK"**. The software loads all unprinted reports.

Note: If this is the first time you have used Express or if you are training by using demo account 999999, there will be no reports on your system. In an actual situation, you would proceed with the following steps.

Hint: Click on any column heading in any Express list box to sort the list accordingly (e.g. click on the DL Number heading to sort the reports by driver license number or service identification). The No. heading sorts the list in the order that the requests were received by the iiX Data Center.

4. Click on a specific report then click **View or simply double-click on any report.**

5. **Use the scroll bar to view on screen the complete report. Use the Next and Previous buttons to view other reports in the list box.**

6. **Click "Close" to exit the view window.**

7. **Click "Cancel" to exit the option.**

Lesson 5: Printing reports

> **Note:** Reports may be printed from either the View/Print Reports option on the Reports menu or from the Print option on the File menu. The File...Print option, however, does not display the list on screen prior to printing nor does it display the number of reports that will be printed.

You may print all reports quickly by selecting Print from the File menu then selecting the Reports option. The following steps, however, detail how to print reports using the View/Print option of the Reports menu.

1. Determine if the system printer is set up properly. See "Setting Up Printers" in the online help for more information.
2. Use the above instructions in "Lesson 4: Viewing reports" to load all available reports, remembering to check the selection criteria.
3. Click on a single report to select it then instead of clicking the View button, click **"Print"**.

To print all reports, select the first one in the list and then while holding down the Shift key, move to and select the last report in the list box. When all reports are highlighted, click **"Print"**.

> **Note:** Once a report has been printed, it is designated and flagged as printed and a graphic icon is placed to the left of the Name field.

Congratulations!

You have completed the basic steps necessary to enter and send request information, and have read procedures to receive and print Express reports. Express for Windows offers a few more functions which you will want to use as you become more familiar with the software:

- editing request information prior to sending data to iiX
- deleting old requests when no longer needed

and several advanced features:

- mailing formatted reports using your e-mail software
- importing and exporting request data
- purging requests and reports

Each of these options are explained step-by-step in individual service chapters and generally work the same for all services.

If you want to continue practicing before changing to your actual iiX Express account, try using your test requests and the manual and help features to complete the first two functions listed above.